Check Before You Sign

Before signing a contract or mortgage, have the person offering products/services complete this form, sign it, and return it to you. Verify both the person and company are licensed and authorized to sell/offer the specific type of product, by contacting the appropriate licensing agency (see reverse side for agency contact information). Keep the completed form for your records.

			any Information (please prin	,					
		Seller/Agent Name							
		Company/Business Name							
		Company/Business Address E-mail E-mail							
\checkmark	I am offering the following product(s) and/or services (check all that apply)								
	☐ Fina	ncial Planning:	☐ Financial Planning Service	es					
	☐ Financial Services:		☐ Mortgage☐ Reverse Mortgage☐ Escrow/Title	☐ Refinance☐ Home Equit			☐ Mortgage Modification ty Loan		
	☐ Real Estate:		☐ Broker/Agent	☐ Other					
	□ Appraisal: □ Insurance: □ Legal Services: □ Accounting:		☐ Home Apprasial Services						
			☐ Mortgage Insurance☐ Earthquake Insurance☐ Other	☐ Title Insurance ☐ Property Insurance ☐ Flood Insurance ☐ Life Insurance		nsurance			
			☐ Document Review☐ Other	☐ Contract Review ☐ Estate Planning		3			
			☐ Accounting Services ☐ Other	☐ Tax Preparation					
	☐ Contractor Services:		☐ Home Repair ☐ Other	☐ Remodeling					
₹	l am cu	rrently licensed	by						
		CA Department of Business Oversight License #:							
	☐ CA Bureau of Rea		l Estate	License #:					
	☐ CA Bureau of Rea		ll Estate Appraisers						
	☐ CA Department of		of Insurance	License #:					
	☐ CA State Bar Asso		ociation						
	☐ CA Board of Acco		ountancy						
			tate License Board	License	nse #:				
?	l certif	y that I am makin	ng these representations tru	ıthfully i	n order to do	business	with you.		
	Signatu	ıre:		Date:					



Contact

the appropriate California licensing agency below (or call the California Department of Business Oversight for referral to other agencies).

Agency	Responsibilities	Contact Information		
California Department of Business Oversight (DBO)	Licenses and regulates individuals and companies conducting various financial activities, including investment advisors, brokers, escrow/titles, mortgages, mortgage servicers, payday lenders and sellers of franchises.	Toll-Free 1-866-275-2677 TTY 1-800-735-2922 www.dbo.ca.gov		
California Bureau of Real Estate (CalBRE)	Licenses and regulates real estate brokers and salespeople, and mortgage lender/broker activities.	Toll-Free 1-877-373-4542 www.bre.ca.gov		
California Bureau of Real Estate Appraisers	Licenses and regulares real estate appraisal industry.	License verification & complaints (916) 552-9000 www.orea.ca.gov		
California Department of Insurance (CDI)	Licenses and regulates insurance agents, brokers, companies, viaticals and annuities.	Toll-Free 1-800-927-HELP (1-800-927-4357) www.insurance.ca.gov		
State Bar of California	Information to help you find an attorney. Also, file complaints and get assistance with reimbursement for attorney misconduct.	License verification & complaints Toll-Free 1-800-843-9053 www.calbar.ca.gov		
California Board of Accountancy	Licenses and regulates certified public accountants, public accountants and accounting firms.	Sacramento (916) 263-3680 www.dca.ca.gov/cba		
California Contractors State License Board (CSLB)	Licenses and regulates 43 classifications of contractors and home improvement specialties.	Toll-Free 1-800-321-2752 www.cslb.ca.gov		