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**PORTFOLIO SCENARIO REQUEST**

Correspondent LO: \_\_\_\_\_ Best Phone #: \_\_\_\_\_

Borrower Name(s): \_\_\_\_\_

Phone Number \_\_\_\_\_ / \_\_\_\_\_ E-Mail : \_\_\_\_\_

**CUSTOMER PROFILE:** Employment: \_\_\_\_\_ Self Employ? Y N  
Position/History: \_\_\_\_\_

Estimated Mid-Credit Score (s): \_\_\_\_ / \_\_\_\_

Monthly Income: \$ \_\_\_\_\_ Cash Reserves: \$ \_\_\_\_\_ Estimated DTI  
Front/Back \_\_\_\_\_ % \_\_\_\_\_ %

Comments: \_\_\_\_\_ Circle (Type) – Checking/Savings/401K/stocks

**PROPERTY PROFILE:** Address: \_\_\_\_\_

# of units \_\_\_\_\_

Type of Property:  Land  \* Condo  Seasonal  Manufactured  Detached Other

Taxes \$ \_\_\_\_\_ Insurance \$ \_\_\_\_\_

Occupancy:  Owner  2<sup>nd</sup>  Investment Property Value \$ \_\_\_\_\_ **Anticipated closing date** \_\_\_\_\_  
Estimated or Appraised?

\*\*\*\*\* Condo – require Partners Bank Condo Affidavit

**LOAN PROFILE:**  
Transaction Type:  Purchase  Refi  Cash Out  Rate/Term  Construction  Purchase Plus Improve

**Proposed Loan to Value:** \_\_\_\_\_ **Term:** \_\_\_\_\_ **Rate** \_\_\_\_\_  Fixed or  ARM

Purchase price \_\_\_\_\_ Loan Amount \_\_\_\_\_ (\$50k min 1<sup>st</sup> mtg.) Comments: \_\_\_\_\_

**Reason for Portfolio Request:** \_\_\_\_\_

Real Estate Agents/Contact info:  
Listing Agent: \_\_\_\_\_  
Selling Agent: \_\_\_\_\_

Refinance Payoff Info:  
- 1<sup>st</sup> mortgage lien holder/acct. #: \_\_\_\_\_  
2<sup>nd</sup>/HELOC lien holder/acct. #: \_\_\_\_\_

Received Date by Partners Bank \_\_\_\_\_

**WHEN SUBMITTING A LOAN SCENARIO IN WHICH THE CREDIT SCORE DOES NOT MEET OR EXCEED A 680 (LOWEST SCORING BORROWER) MID SCORE, PLEASE CLEARLY INDICATE THE COMPENSATING FACTORS AND PROVIDE SUPPORTING DOCUMENTATION**

**\*\*\*IF looking to utilize existing work (for a back to back HELOC), please indicate vendors:**

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