

BUSINESS & LABOREXHIBIT NO. 7
DATE 2/9/2021
BILL NO. SR 30

Loren Brown
8395 Applegate Dr
Helena, MT 59602
406-431-5834
lorenjbrown@outlook.com

November 20, 2020

Dear Governor-elect Gianforte,

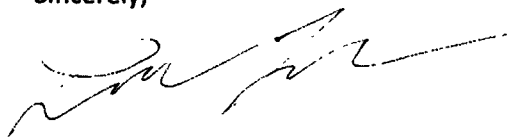
I would be honored to serve on the State of Montana Banking Board. I humbly ask for your consideration to serve our state under your leadership in this capacity. As a business owner and entrepreneur yourself, I know you understand the critical function banks serve in the economy and the health of our state. I am thrilled to have a governor for our wonderful state that understands business and the contributions businesses make to improving the lives of all of the residents of Montana.

Currently I am the President and CEO of Ascent Bank and its holding company, Ascent Bancorp. Five years ago, I led a small team to form an investor group and formed Ascent Bancorp to acquire First Security Bank of Helena from its previous ownership. Prior to taking the helm at First Security, that we rebranded this year to Ascent Bank, I was an executive with Mountain West Bank, N.A, a federally chartered Montana based bank. There I learned the importance of community banks in the success of small businesses and in turn the health of our communities. As I was raising capital for my acquisition, I met with and earned the trust of numerous investors that had been customers of Mountain West. A common theme among them was that without that bank, they would not have the businesses they did. My entire reason for wanting to acquire and lead my own bank was to be able to make people's lives better and improve our communities in Montana. These investor conversations just reenforced my belief that a community bank was critical to the health of Helena and Montana. I have taken that belief farther by serving on the Montana Independent Bankers Board to help other community banks in Montana.

As a native Montanan, I am deeply committed to the state of Montana. I serve on several non-profit boards for organizations committed to the betterment of people's lives. I work well with others even those with opposing views to achieve common goals. I look for common ground while finding ways to improve organizations I help lead to the benefit of all stakeholders. I believe I could use this same approach and skill set in serving Montana as a member of the Banking Board.

I have uploaded my resume to the servemontana.com website along with this cover letter. I would be happy to discuss with you my thoughts and answer any questions you may have about me or my beliefs.

Sincerely,



Loren Brown

- Objective** **To join the State of Montana Banking Board as a Montana based community bank representative. To have pride and passion about my duties, in helping guide banking activities in the State of Montana for the betterment of our great state. To grow and learn each day and look for new opportunities to help make myself and banking in Montana better. To be involved in my community and make a difference in people's lives.**
- Experience**
- President, CEO, and Chairman**
Ascent Bank, Helena, MT **2016-Present**
- Also serves as President and CEO of Ascent Bancorp
 - Provide strategic guidance and oversight to the bank
 - Represent the bank in the community, state, and nation
 - Champion and lead major projects for the organization
 - Interact with loan and deposit customers
 - Provide training for staff
- Director of Banking Services**
Ascendant Advisory Group, Montana City, MT **2015-2016**
- Lead strategic planning sessions for financial institutions
 - Advise financial institutions on operational plans and efficiencies
 - Assist non-bank clients with interactions with financial institutions including loan negotiations and product selection
 - Consult with businesses from a variety of industries to improve their companies and help them succeed
- Manager**
Galusha, Higgins & Galusha/Wipfli, Helena, MT **2014-2015**
- Provided financial institution consulting and advisory services
 - Assisted with financial institution auditing and agreed upon procedures
 - Supported financial institution and personal tax return preparation
 - Provided small business consulting and advisory services
- Senior Vice President/Cashier**
Mountain West Bank, N.A., Helena, MT (various positions/titles) **2004-2014**
- Managed finance department
 - Oversaw IT, maintenance, and security departments
 - Responsible for bank, holding company and related entity financial reporting and forecasting
 - Chaired ALCO/Investment Committee
 - Chaired New Consumer Product Development Committee
 - Integral in development of new, consumer friendly website
 - Managed rates and features for deposit accounts
 - Developed consumer loan pricing and decision model for bank's consumer loan officers
 - Revamped consumer real estate lending documentation process for increased efficiency and regulatory compliance

- Owner/Computer and Networking Consultant**
Loren Brown Computers, Helena, MT **1998-2004**
- Implemented computer and networking technology in rural schools
 - Worked with a variety of non-profit groups to automate membership systems and to achieve an online presence
 - Provided sales and service to local consumer and business customers
- Education**
- The Wharton School, University of Pennsylvania, Philadelphia, PA** **2014**
- Aresty Institute of Executive Education – Wharton Leadership Certificate
- ABA Stonier Graduate School of Banking, University of Pennsylvania, Philadelphia, PA** **2009-2011**
- Graduate Degree in Banking
 - Capstone paper studying an Initial Public Offering for Mountain West Bank
- Carroll College, Helena, MT** **2001-2004**
- Bachelor of Arts, Summa cum Laude
 - Major in Business Administration with Concentrations in Economics, Finance, and Management
 - Major in Accounting
 - Minor in Economics
 - Honor's Thesis entitled "Banking Queues and A's"
 - Delta Epsilon Sigma College Honor Society
- Community Involvement**
- Current**
- Montana Independent Bankers Secretary/Board Member
 - West Mont Board Member
 - West Mont Foundation Board Member
 - St. Peter's Health Board Member
 - Sleeping Giant Flying Club Vice President/Board Member
 - Helena Chamber of Commerce Drivers of Change Advisory Committee Member
 - Boy Scouts of America
 - Nominating Committee Chairman, Prickly Pear District
 - Committee Member, Pack 207
 - Committee Member, Troop 207
- Previous**
- Boy Scouts of America
 - Chairman, Prickly Pear District and Montana Council Board Member
 - Scoutmaster, Troop 207 and Troop B340 Montana Contingent to 2013 National Jamboree
 - Vice Chairman Finance, Prickly Pear District
 - Investment in Character and Leadership Community Campaign Chairman, Prickly Pear District
 - Boy Scout Leader Training Coordinator, Prickly Pear District

- Friends of Scouting Family Campaign Chairman, Prickly Pear District
- National Order of the Arrow Conference Committee
- Order of the Arrow Lodge Chief/Council Board Member, Montana Council
- Order of the Arrow Section Chief, Section 5C, Western Region
- Assistant Scoutmaster, Troop 936 Montana Contingent to 2001 National Jamboree
- Helena Chamber of Commerce
 - Chamber Golf Tournament Committee Member
 - Steering Committee Member, Leadership Helena



Thomas R. Swenson
125 Bank Street, Suite 100
Missoula, MT 59802

November 20, 2020

Dear Governor-Elect Greg Gianforte,

The purpose of this letter is to address the reasons why I would be honored to be reappointed to the State of Montana Banking Board.

I love Montana. I strongly believe in the need for a vibrant and varied banking community focused on servicing our largely rural state. I have spent the last 28 years virtually entirely focused on helping small businesses gain access to capital and/or banking.

I believe I am a fair and open-minded person who would respect this appointment and would be dedicated to serving the banks and citizens of Montana. I would like to give back to the Montana banking system and to Montana's citizens as both have been very kind to me over the years.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to be 'T. Swenson', written in a cursive style.

Thomas R. Swenson

THOMAS R. SWENSON

201 University Avenue · Missoula, Montana 59801 · (406) 370-5026

WORK EXPERIENCE:

- **Founder/Director/CEO, Bank of Montana and Bancorp of Montana Holding Company, Missoula, MT**
11/07 - Present

Duties: Safely and soundly manage Bank of Montana enabling it to both serve its community and provide an optimal return to investors. Bank of Montana's focus is in economic development and affordable housing; serving small business owners and affordable housing developers, who create jobs and affordable housing.

- **Founder/Director/CEO/President, Bank of Montana and Bancorp of Montana Holding Company, Missoula, MT**
11/07 - 02/20

Duties: Safely and soundly manage Bank of Montana enabling it to both serve its community and provide an optimal return to investors. Bank of Montana's focus is in economic development and affordable housing; serving small business owners and affordable housing developers, who create jobs and affordable housing.

- **Founder/Director/CEO/President, Bancorp of Montana Holding Company/Montana Business Capital Corporation, Missoula, MT**
12/98 - Present

Duties: Since 2007, provide oversight and capital to Bank of Montana and conduct limited financial services within the holding company. From inception until adding bank charter to the organization, provided investment banking, capital markets, loan brokerage and small business consulting services to commercial enterprises and financial institutions. Focused on projects which encouraged economic development and affordable housing.
Primarily provided commercial loan products, with a specialty in government enhanced loan products.

Accomplishments: Facilitated loan funds which facilitated the creation of more than 40,000 jobs and thousands of affordable housing units. Successfully completed bank charter and complex financial services holding company applications with the State of Montana, FDIC, and the Federal Reserve Bank. Retained adequate equity within the firm through profitability that allowed me to retain majority ownership of the holding company, while founding Bank of Montana, which is wholly owned by the holding company. Produced more economic development loans for the State of Montana pension and coal tax trust fund ("MBOI") than any other organization in MBOI's history. MBOI has more than \$19 billion under management. Bank of Montana's loans represent more than 50% of MBOI's entire commercial loan portfolio. There has been zero loan loss related to Bank of Montana loans.

- **Director of First National Bank of Montana, Missoula, MT**
6/02 - 1/06
Duties: Bank Director and member of multiple bank committees.

- **President and Board Member, Montana Community Development Corporation (now MoFi CDC), Missoula, MT**
5/97-12/98

Duties: Led organization in attaining unprecedented commercial loan growth; developed products and product lines, which optimized the organization's impact on Montana while maintaining financial

strength; developed contractual relationships with government agencies in order to obtain loan funds and operational revenues; managed lending staff and ensured adherence to loan policy and production goals; developed and improved existing corporate policies and systems; located and obtained capital to fund growth; improved and updated existing business plan in order to optimize market positioning and economic development impact on our region. Also renamed the organization Montana Community Development Corporation from its preceding name, Wedgo, and spearheaded taking the organization from being a "support organization" of the non-profit Home Word and making it the stand-alone entity it is today. The organization has had great success and is known to be one of the largest providers of new market tax credits in the United States.

Accomplishments: Quadrupled commercial loan portfolio; more than quadrupled monthly production levels while improving investment strength; increased loan fund by 300%; produced 36% of Community Development Block Grant Economic Development loan activity allocated to the State of Montana for 1997; produced 22% of Community Development Block Grant Economic Development loan activity allocated to the State of Montana for 1998 and successfully negotiated multiple, significant revenue-producing, service contracts. Received accolades from the Montana Department of Commerce regarding greatest loan portfolio growth in state, while achieving lowest delinquency and charge off rates in state.

- Assistant Vice President, Farmers State Bank, Victor, MT

7/92-5/97

Duties: Effectively pursued commercial loan growth; developed and managed call program; pursued and closed government guaranteed loans; managed loan portfolio, emphasizing commercial loans; located and purchased commercial loan participations; developed a commercial loan-review department; supervised loan-review staff; sat on the loan-review board; reported to the board of directors evaluating the risk of the commercial loan portfolio; developed and tracked adherence to the \$100 million plus annual budget; interacted with examiners; developed a business plan in order to benefit from rapid deposit growth; completed a branch application; and performed profitability analyses on services provided.

Accomplishments: Assisted in attaining robust commercial loan growth through development of call program and promotions; achieved strong loan portfolio growth while maintaining low delinquency and loss rates; created loan-review department, which resulted in reportedly the most favorable examination in the preceding ten years and aided the significant commercial loan portfolio growth; and created budget which assisted in successfully attaining 50% growth and exceptional profits within a two-year period. As of 5/97 FSB was one of the ten largest banks based in Montana.

- Instructor of Management and Departmental Computing Coordinator, University of Montana, Missoula, MT

9/91-7/92

Duties: Taught and developed curriculum for capstone Small Business Management course; called on Western Montana businesses to increase the level of interaction between the university and the business community; taught Business Statistics series; made recommendations for computer usage; and prioritized computer capital expenditures.

Accomplishments: Achieved an extraordinary level of private industry participation in my course work and received excellent student reviews.

- General Manager/Controller, Bitterroot Precut, Inc., Victor, MT

9/89-9/91

Duties: Responsible for general management duties, managing national dealer sales network, and all financial duties; supervised office staff of 9 and production staff of over 35. Promoted to general

manager March 1990. Continued performing duties as consultant through June 1992.

Accomplishments: Completed business plan; utilized plan to secure over \$1 million in equity financing and a revolving line of credit; implemented business plan-resulted in a 50% increase in sales and increased profitability; and developed a comprehensive accounting system.

- Instructor of Accounting (“Graduate Assistant”), University of Montana, Missoula, MT
9/88-6/89

Duties: Taught Principles of Accounting series to college classes of approximately fifty students.

Accomplishments: Maintained an environment conducive to learning-resulted in above average performance of students and excellent student evaluations of instructor. This position represented the work portion of a scholarship awarded to me reportedly based on having among the top few combined GMAT scores and undergraduate GPAs in the class.

- Assistant to the Treasurer and acting Purchasing Agent, United States Bronze Powders, Inc., Flemington, NJ
6/88-9/88

Duties: Prepared monthly financial statements; presented the information at monthly management meetings; computerized the financial statements on IBM System 38; and purchased for USBP and two of its subsidiaries.

Accomplishments: Automated financial statements on IBM System 38; created purchasing controls which reduced costs; and streamlined inventory controls.

- Controller, AMPAL, Inc. (a subsidiary of USBP) Flemington, NJ
7/87-6/88

Duties: Prepared monthly financial statements; analyzed the statements; reported the results directly to the president and bank officials; negotiated with banks concerning lines of credit and long-term financing; supervised inventory, payroll, accounts receivable and accounts payable functions; and worked with public accountants and state auditors. Utilized IBM System 38, LOTUS 123 and WordPerfect in performing these duties.

Accomplishments: Developed a cash flow system which resulted in significant annual interest expense savings; successfully negotiated reduction of interest rates on lines of credit with Philadelphia National Bank; and streamlined financial statement preparation process reducing staff necessary and time required to produce statements.

EDUCATION:

- University of Montana (AACSB accredited), Masters of Business Administration (President of Class)
Emphasis: Finance GPA 3.8/4.0
6/89
- University of Montana, Bachelor of Science, Business Administration
Major: Accounting GPA 3.5/4.0
6/87
- At University of Washington, Graduate of the Pacific Coast Banking School
9/98
- At University of Oklahoma, Graduate of the National Commercial Lending School
5/94
- Have attended numerous banking seminars regarding appraisal methodology, community development block grants, government guaranteed lending, small business management, loan documentation, loan structuring, etc.

HONORS:

- **Featured speaker at SBA, DOC, World Trade Center, Max Baucus' Economic Development Forum, Missoula County Realtor Organization events, University of Montana, and numerous other community events.**
- **Member of Kiwanis**
- **Licensed real estate agent**
- **President of the MBA Association 1988-89 academic year**
- **Member of Beta Gamma Sigma, a scholastic business honor society**
- **Graduate Assistant, 1988-89 academic years, Department of Accounting and Finance**
- **Recipient of a University of Montana Scholastic Honor Scholarship**

COMMUNITY SERVICE:

- **Former Interim President of Youth Homes Board. Youth Homes employs more than 100 people and provides transitional and permanent housing as well as other social services to children.**
- **Former Missoula Symphony Board Member**
- **Former Director and Treasurer of Montana District Export Council as appointed by the United States Secretary of Commerce**
- **Former Director of International Trade Alliance in Spokane, Washington**
- **Founder and Charter member of the University of Montana's Montana Academy of Distinguished Entrepreneurs ("MADE").**
- **Former Member of the University of Montana Business School's Business Advisory Council**
- **Former Federal Reserve Bank of Minneapolis – Helena Branch Director 1/11 – 12/16**
- **Member State Banking Board of Montana (one of two banking members of total 6 members); appointed by the Governor of Montana and confirmed by the State of Montana Senate 2018-Current**

LICENSES:

- **Licensed Real Estate Salesperson, License. #13951 Issued. 8/6/2004 - Current**
- **Housing and Urban Development Multifamily Accelerated Processing Underwriter – HUD MAP Underwriter/Bank of Montana MAP Lender.**
- **Licensed pilot in the United States, Australia and NewZealand.**

November 15, 2020

Governor-elect Mr. Greg Gianforte
PO Box 877
Helena, MT 59624

Ms. Sarah Converse
221 16th Avenue South
Great Falls, MT 59405

Dear Sir,

First and foremost, congratulations, to you and Susan on the election and the exciting future that you have leading Montana. Attached you will find my resume in application of a position within your upcoming state administration. I am very excited to assist you with the transition as well as shaping the business infrastructure within Montana.

I have extensive professional experience community and economic development, government affairs and a bit of agriculture. The region that I currently represent is north central Montana, Cascade, Glacier, Pondera Teton and Toole counties, as well as the Blackfeet Reservation. I have assisted with water projects, opening new businesses as well as working with the Blackfeet Tribe on long term planning and the Blackfeet Community College. In my tenure with Sweetgrass Development I have fostered relationships in the region, state and nationally.

My involvement in government relations, range from local county government, state and federal, as a Field Representative for the former United States Senator Conrad Burns. These experience spanning 25 years has given me the ability to listen and work cooperatively with other on all levels. Whether it is a small group setting or a large conference center, I am able to communicate effectively with the audience, to articulate a specific position regarding the issue at hand. Thinking creatively and problems solving are key to assisting on the grassroots level and growing our economy in Montana.

I was born and raised in Montana and have been involved in public policy all of my life. I possess the knowledge and skills, gained through my work history to succeed where you believe I shall be the most valuable. I believe that this is an opportunity in which I would not only excel, but I would also be a tremendous asset to your Administration and the state of Montana.

If your transition team has any questions, please feel free to contact me via e-mail at SarahKConverse@gmail.com or via telephone at 406-899-7959. I will also follow up with the office in a few weeks. Thank you very much for your time and consideration in advance, I look forward to working with you.

Yours truly,



Sarah Converse

Sarah K. Converse

221 16th Avenue South
Great Falls, MT 59405
SarahKConverse@gmail.com

(406) 899-7959 (H)(C)

CAREER SUMMARY

More than 20 years' experience in public relations, administrative operations, customer service and government affairs. Proficient in developing and formulating effective legislative strategies, through research and communication. Fostered relationships between public and private entities, for community advancement. Focused on community, as well as individual, rehabilitation for growth and development.

- | | | |
|----------------------------|-------------------------|--------------------|
| *Consensus Builder | * Community Interaction | * Policy Knowledge |
| * Knowledgeable Researcher | * Outreach Coordinator | * Event Organizer |
| * Experienced Presenter | * Government Relations | * Public Affairs |

PROFESSIONAL EXPERIENCE

Executive Director

June 2010-Present

Sweetgrass Development

521 1st Avenue Northwest Great Falls, MT 59405

Board of Directors (17), Founders Llew Jones, Cyndi Johnson, Lorette Carter

- Maintain a non-profit organization with accurate reporting and record keeping. Organize Executive and Board meetings on monthly and quarterly basis. Participate in local, regional, state and national meetings and conferences while maintaining regular duties.
- Participation in federal and state programs. Assist with grant funding for projects by leveraging program dollars. Communicate opportunities to public and private entities throughout the region.
- Inclusion in local and regional planning efforts, including the CEDS document. Work with local governments in support and to assist in the development of community projects.
- Assist with project development, including funding sources, business plan development, grant writing and resource guidance. Offer technical assistance and training opportunities throughout the region. Partner with local organizations for business development.
- Promote best practices and innovative development activities for rural areas. Assist businesses with financial opportunities through the Revolving Loan Fund as well as other financing.

Executive Director

Great Falls Convention and Visitors Bureau

November 2009-Current

Great Falls Tourism Business Improvement District

1324 Central Avenue West, Suite 1

Great Falls, MT 59401

Sandie Johnson Thares – Board Member CVB and TBID

- Organize and maintain an office for CVB and for the TBID. As part of maintenance of the office, provide for answering of the telephone and taking messages, answering requests for information, sending advertising inquiries and other information as requested;
- Attend meetings of the Board of Directors of both CVB and TBID; attend committee meetings necessary; trade shows; TAC meetings, the MT Governor's Conference on Tourism.
- Take minutes of the Board of Director meetings for both CVB and TBID, and distribute minutes to the members.

- Keep and maintain all records of CVB and TBID, work with the CVB and TBID Boards to prepare annual budgets, and work plans where appropriate, and provide any documents and reports requested by the City of Great Falls and the State of Montana. Submit all project applications as requested.
- Maintain visibility in the Great Falls community on a regular basis, to promote Great Falls consistent with the missions of CVB and TBID.
- Work with local, state, and national media outlets to promote Great Falls, its various community events, historic appeal, and other unique characteristics, and foster positive media contacts with Great Falls.

Customer Care Supervisor and Provider Relations Field Representative

ACS (Affiliated Computer Services)

April 2007 – October 2009

34 N Last Chance Gulch, Ste 200

Helena, MT 59601

- Monitor call center employees, including schedules, quality of call information, and call times.
- Work with call center employees to improve efficiency and to keep all call times within the contractual time frames.
- Answer questions of the call center and assist on telephones as needed for electronic data issues as well as answering payment and claim processing questions Work closed with all departments within ACS to
- Conduct Statewide Spring and Fall Provider Trainings for Montana's Healthcare Programs.
- Work one on one with providers in person and via telephone, troubleshooting billing issues.
- Provide training to providers new to the Medicaid system to assist with claim submission and an understanding of the process.

Field Representative

United States Senate – Senator Conrad Burns

June 2000- January 2007

321 1st Avenue North

Great Falls, Montana 59401

- Acted as the Senator's liaison to all local government, community and constituent groups and leaders North Central Montana.
- Performed all administrative office duties as required.
- Work closely with local groups and entities for funding through the Appropriations process.
- Planned and coordinated events for Presidential, Senatorial, and cabinet level dignitaries.
- Coordinated conferences and events for specifically targeted groups.
- Assisted the Senator in planning and implementing legislative strategies through research and communication.
- Evaluate and monitored developments, opinions and concerns regarding policy at the grassroots level.
- Assist constituents through congressional inquiries with various Federal Agencies.

Core Manager

Mountain Peaks, Incorporated

1999-2000

922 1st Avenue North

Great Falls, Montana 59401

Jeff Mangan – President/CEO

- Performed targeted intensive management for juvenile delinquents.
- Conducted school and home visits, tracked electronic monitoring of specific offenders.
- Testified before the State District and Justice courts as needed for probation monitoring.
- Worked closely with the Cascade County Attorney and Juvenile Probation offices, State Department of Corrections, mental health counselors, school administrators and parents in monitoring each individuals plan and progress

Legal Secretary/Receptionist

Cascade County Attorney's Office
121 4th Street North
Great Falls, MT 59401

1997-1999

- Performed basic administrative tasks including, but not limited to operating the multi-line telephone system, providing information to visitors as well as admittance through a restricted entrance.
- Responsible for all of the District Court filing, opening new case files, sorting and storing closed files.
- Conducted the daily mail distribution and case filing within the District Court as well as Justice Court.
- Responsible for resetting hearings and performing other miscellaneous duties as requested.

Legislative Researcher/Intern

Montana State University Bozeman-Associated Students of Montana State University 1996-1997
Strand Union Building
Bozeman, MT 59715

Jim McCray, ASMSU President

- Represented ASMSU as the student legislative researcher for student and University issues during the 1997 State Legislative Session. Conducted research pertaining to the students at Montana State University and within the University System as a whole.
- Discussed legislative issues that impacted students with legislators, lobbyists, administration, faculty and the Commissioner for Higher Education.

Education

Montana State University – Bozeman

Bachelor of Science

Major - Sociology, Social and Criminal Justice Minor – Public Administration

Other Experience

- Political campaign volunteer and event coordinator 2000-present
- Combined Federal Campaign 2000-2006
- Wee Disciples PPA – President 2002-2005
- Leadership Great Falls – Great Falls Chamber of Commerce 2003-2004
- Toys For Tots Campaign 2004
- American Business Women's Association 2008-2010
- Susan G. Komen Race for the Cure 2008-2011
- Big Sky Pro Rodeo Committee 2011-2016
- Montana Big Sky Pro Rodeo Roundup Committee 2010-present
- VBS volunteer Crossroads Memorial Bible Church 2012-present
- 4H volunteer 2010-present
- Salvation Army Volunteer and bell ringer 2010-present
- GF Chamber Business Affairs and Agriculture Committees 2010-present
- Montana Economic Developers Association (MEDA) 2010-present
- MEDA Board of Directors 2013-present
- MEDA Executive Committee 2020-present
- National Association of Development Organizations representative 2010-present
- Montana Association of Counties (MACO) participant 2010-present
- MEDA representative to MACO 2014-present
- MACo CEDL committee member/secretary 2016-present

***References Available Upon Request

William L. Davies
2335 Crimson Lane
Billings, Montana 59106
(406) 670-7949

Profile: **Successful, Community-Minded Bank Executive**
After a successful 10-year career in the practice of law, transitioned to leadership position at U.S. Bank, one of the nation's largest and most successful banks. Bring proven technical skills, as well as strong interpersonal communication skills, to demanding and varied financial services position. Additionally, utilize proven leadership skills to manage and mentor a large, diverse professional workforce in the financial services industry. Focused on community and bring a track record of service and involvement both locally and regionally.

Relevant Experience: U.S. Bank, Billings, Montana
Regional President, Montana/NW Wyoming Region (February 2016-Present)

Actively oversee 30 branches throughout Montana, Wyoming and Western Nebraska. Leader of strategic delivery of banking services within that branch network, which services include retail and commercial lending and deposit services, private banking and wealth management services, small business banking and treasury management services. Gained insight and expertise in managing the overall complexities of a large financial institution, including:

- High level collaboration between diverse employees working in diverse business lines
- Efficient use of human resources to maximize performance and maintain engagement
- Management of complex credit risk in a rural, community marketplace
- Implementation and maintenance of a rigid operational control system, designed to improve client experience and overall financial results, while minimizing errors, losses and reputational risk.

Senior Managing Director, Private Client Group (2006-2016)

Successfully led teams delivering private banking and personal trust services in multi-state geographic area which primarily includes Montana and Northern Wyoming, but with influence over markets in Colorado, New Mexico, North Dakota and South Dakota. Successfully served as manager of a team that grew net revenue in area of responsibility from \$3.4 million to nearly \$4.4 million over seven-year period, with my individual revenue results generally among the top of all producers nationally. Gained critical expertise and experience in all facets of wealth management, including:

- Delivery of active investment portfolio management
- Delivery of fiduciary trustee services
- Management of specialty assets, including residential and commercial real estate, farms and ranches, natural resources, and private equity
- Completion and delivery of complex financial plans and delivery of in-depth advisory services for high net worth individuals and families
- Delivery of banking and financial products for high-net worth individuals and families
- Analysis of credit and unique characteristics of credit for high-net worth individuals and families

Additionally accepted numerous roles within the Bank, providing heightened level of support, mentorship and guidance to individuals in wealth management nationally, including:

- Appointed as the only front-line employee to the Bank's national executive committee formulating policies and procedures for governance of the Bank's overall delivery of wealth management services (2014 -2017)
- Appointed as one of eight employees nationally who carried the Bank's highest level of approval authority for wealth management related transactions (2010 to 2016)
- Appointed chairperson for the Bank's 10-person national committee overseeing, approving and managing fiduciary transactions and relationships identified as having the highest risk for the Bank (2014 to 2016, national chair; 2008 to 2013, voting member)
- Served on the Bank's ad hoc advisory committee steering strategic and tactical ideas for business line growth (2012 and 2014).

Legal Experience: Felt, Martin, Frazier & Weldon, Billings, Montana
Attorney (2000 – 2006)

Maintained general commercial practice, emphasizing business formation and transfer, real estate sales and foreclosure, and other business and corporate contractual and planning matters. Also developed and oversaw firm's estate planning, trust and probate practice. Lectured frequently to community groups on wealth transfer issues and on issues related to guardianship, conservatorship and powers of attorney for financial and health care purposes. Handled numerous commercial-related law suits, including matters related to corporate dissolution, fraud, trademark and trade dress infringement, debt collection, and breach of contract. Representative clients included Bank of America of St. Louis, Mo., Northern Trust Bank of Chicago, Ill, U.S. Bank Trust of Billings, MT.

Crowley Fleck Law Firm, Billings, Montana
Attorney (1996 – 2000)

Engaged in general commercial transactional practice with the region's largest private firm. Practice emphasized estate and trust planning, probate, real estate sales and foreclosure, leases, bank and creditor finance issues, and property tax assessments and appeals. Performed some commercial litigation.

Education: University of Montana School of Law, Missoula, Montana
Juris Doctorate, May 1996 Cumulative GPA 3.23/Top 20%

Activities/Honors: Phi Delta Phi, Sarsfield Scholarship Recipient

University of Wyoming, Laramie, Wyoming
Bachelor of Science with Honors, May 1993

Certifications:
Certified Financial Planner (CFP®)

Professional/ State Bar of Montana, Member (1996 to present)
Community Yellowstone Area Bar Association, Member (1996 to present)
Involvement: Yellowstone Boys and Girls Ranch Fdn., Board Member (2015 to present)
Alberta Bair Theater, Board Member (2018 to present)
Bair Ranch Fdn., Board Member (2009 to present, Vice Chair 2014-2016, Chair 2017-present)
Bair Family Trust, Advisor Member (2009 to present, Chair 2019 - present)
Silver Run Ski Education Fdn., Board Member (2011 to 2016)
Yellowstone County Guardianship Council, Member (2012 to 2015)
YWCA Endowment Fdn., Board Member (2012 to 2015)
Leadership Montana, Graduate 2008
March of Dimes, Board Member (2006 to 2012)
Yellowstone Area Head Start, Board Member (2000 to 2006)
Billings Depot, Inc., Board Member (1999 to 2002)
Mental Health Association, Board Member (1996 to 2000)
"40 Under 40" Award, Recipient, Western Business News (2000)
Leadership Billings, Graduate 1998

Personal: Enjoy fly fishing, alpine skiing, water sports, golf, and running. Coached competitive youth soccer for several years and served as a certified soccer referee. Married with two children.