



Position: Treasury Management/Business Development Officer
Reports To: Chief Executive Officer
FLSA: Exempt
Location: Idaho Bank- 233 E. Idaho Street, Kalispell, MT 59901

Position Summary

This position assists the Leadership Team in the development and implementation of a strategic, multi-faceted business development program designed to promote, retain, and increase the Bank's customer base and visibility in the communities that we serve following the organization's Mission Statement and Core Values, including the Advantage Business Model.

This position will also help grow and support the Branch Managers, Retail, and Lending Team by building a Partnership Program to create and grow new personal and business accounts for the Bank. This position reports to the Chief Executive Officer.

Essential Duties and Responsibilities:

- Professional, well-developed interpersonal skills necessary for serving customers and projecting a positive image as a Three Rivers Bank of Montana representative.
- Develop opportunities to promote, retain, and grow Customer relationships.
- Develop opportunities to promote, retain, and increase the Bank's visibility in the communities we serve.
- Represent the Bank at local events and networking functions to help increase brand visibility.
- Represent the Bank at educational events – seminars/presentations, promotional events, and local events.
- Prospect new partnerships for the Bank through networking.
- Work to create a Partnership Program with businesses in our service area.
- Develop special offers, newsletters, email blasts, lunch and learns, etc. for current and prospective bank partners.
- Propose, manage, and monitor the success of the business development programs.
- Maintains a wide variety of contacts inside and outside the Bank, coordinating business development activities, promoting services, exchanging information, and representing the Bank at civic, trade functions, and professional organizations.
- Active participation in local Chamber of Commerce groups, Economic Development Corporations, and other local organizations.
- Research and stay abreast of industry trends and demographics.
- Ensure that all information and transactions regarding bank members are kept confidential.
- Maintain current knowledge of bank philosophy, all bank services, and policies.
- Maintain a professional and courteous attitude with all people, including fellow employees, customers, management staff, board members, and outside vendors.
- Cooperate with other department personnel to ensure a "team effort" and prompt customer service.

January 2025

- Perform all duties following the Bank’s service standards, operations policies, procedures and remain in compliance with applicable state and federal laws and regulations.
- Identify reportable transactions and activities under the Bank Secrecy Act (BSA), implementing its regulations, and Unison’s Anti-Money Laundering program. Comply with requirements under the Customer Identification Program (CIP), FinCEN 314a procedures, and OFAC regulations and sanction programs.

Additional Responsibilities:

- Must have the flexibility to work 40 hours/week Monday - Friday, along with additional evening and weekend hours as necessary to meet deadlines or accomplish objectives, goals, and projects.
- Complete required compliance training annually.
- Participate in Bank committees as assigned.
- Participate in a minimum of two Heritage Club events annually.
- Participate in two Highlander Cross Country or Track events annually.
- Adherence to the Advantage Business Model and being Montana Tough.

Qualifications:

- Excellent oral and written communication skills.
- Ability to multi-task.
- Knowledge of Client Relationship Management systems.
- Proficiency with personal computers and job-specific programs.
- Excellent telephone manners and techniques.
- Requires the ability to work within deadlines and prioritize multiple projects.

Education and Experience:

- A bachelor’s degree in business marketing or a related field is required.
- 3 – 5 years of experience working in banking Sales and/or Business Development.
- Understanding and knowledge of the financial industry.

Physical Demands:

- Normal office environment.
- Extended PC viewing and keyboarding with periods of sedentary work.
- May be required to stoop, kneel, stand, walk, talk, hear, and reach with hands and arms.
- May be required to occasionally lift/move up to 40 pounds.

The physical demands noted above are representative of those that must be met by an employee to successfully perform the essential function of the position. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Employee Signature

Printed Name

Date
