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From Teller to Market President

Sam Isaac Leads BMO's Growth in Oregon and Washington

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From Teller to Market President: Sam Isaac Leads BMO's Growth in Oregon and Washington

By Tom Unger, ABC, APR, Fellow PRSA

Hard work. Honesty. Humility.

Those principles instilled by his mother helped guide former teller **Sam Isaac** during his 21-year career at Wells Fargo.

After he served as a Wells Fargo district manager in Oregon for 10 years, Bank of Montreal (BMO) hired Isaac in April as a retail market president. He oversees 20 financial centers (branches) in Oregon, eight in Washington, and 126 teammates.

"When BMO approached me, I was excited because it aligned my career growth with our desire to stay in Oregon where my family has built a life and established strong community connections," said Isaac, of Tigard. "After 21 years with one organization, I was ready for a new challenge."

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"I am very impressed with BMO's culture," he added. "They trust and support their leaders to develop their teams, serve their communities, and grow the business."

Isaac's predecessor was based in Illinois. "They wanted someone who lives in-market and could work closely with the teams in the Pacific Northwest," he said.

"Sam has made an immediate impact at BMO by building partnerships across our internal teams and with key community stakeholders," said BMO Regional President **Christian Aragon** for Northern California and Pacific Northwest. "He leads with a truly client-centric mindset. He is dedicated to the growth of his team and to making our communities stronger."

Canada's Oldest Bank

Founded in 1817, Bank of Montreal is Canada's oldest bank. With $1.5 trillion in total assets, it is the eighth largest in North America. It operates in the U.S. under the brand BMO.

BMO entered Oregon and Washington by acquiring Bank of the West in 2023. According to FDIC data (2025), BMO ranks 17th in size in the two states with 0.64% market share and $2 billion in deposits.

Two of Isaac's biggest goals are to help BMO increase awareness of its brand and earn more market share by elevating the client experience across all the centers, he said.

Second Generation Banker

Isaac's parents are from Pakistan where his father was a banker at Citibank. His parents moved to California in 1985 with his older sister and brother. Isaac was the first in his family to be born in the United States.

"My parents wanted to give us a better life. They made a lot of sacrifices to bring us to this country," said Isaac.

Isaac originally planned a career in music. He played guitar in several different bands. His sister started her career in banking and encouraged Isaac to join the industry.

After high school, he started working as a teller at Wells Fargo in 2005. Banking proved attractive.

"What I really love about banking is being able to help people through every phase of life, from getting married, to buying a house, to having kids. That, to me, is impactful," Isaac said.

Meeting Rita

Isaac met his wife, **Rita**, when both were children in the Bay area. "Our families knew each other. We were always just friends," he said.

Later in life, they ran into each other at a wedding. Isaac asked Rita to be his date for a wedding the next weekend. "Since then we've been inseparable," said Isaac. They married in 2018.

Rita works in the nonprofit healthcare industry. The couple has two daughters.

Coming to Oregon

Isaac followed his mentor, former Region President **Tracy Curtis**, to Oregon in 2016 to become a Wells Fargo district manager. He oversaw 10 branches and 105 employees in the Portland area.

"I have known Sam professionally for 20 years," said Curtis. "One of Sam's key strengths is his ability to engage a team. He has the ability to individualize his coaching, ensuring he meets the individual team member where they are and with the coaching they need."

The Isaacs hadn't lived in Oregon before. They grew roots here.

"We love to hike and the outdoors. We're big foodies," he said. "We're huge fans of everything about the Pacific Northwest."

Encouraged by Curtis, Isaac enrolled in the Pacific Coast Banking School. He graduated from the program in 2022 and earned a certificate in leadership from the University of Washington's Foster School of Business.

Isaac's districts changed through the years. He managed branches in various parts of Oregon. When he left, he was overseeing 14 branches and 115 employees.

Community Involvement

Isaac has been an executive board member of the Maurice Lucas Foundation since 2019. The nonprofit provides free academic and athletic programs to at-risk students in the Portland area.

"Sam has been a tremendous asset to our organization," said **David Lucas**, founder and executive director. "His leadership, integrity, and commitment to our mission have helped strengthen both the foundation and the communities we serve. We're grateful for his contributions and the positive impact he's made over the years."

BMO's Value Statement

What sets BMO apart in this region is the ability of its employees to help customers with their needs, said Isaac.

"When you walk into one of our financial centers, you can expect a welcoming experience that reflects our commitment to our community," said Isaac. "We're focused on helping people make real financial progress, no matter what stage of life they're in, and we bring programs like Bank at Work to the local business community.

"By staying close to our clients and working together with our teams and community partners, we can help individuals and businesses reach their goals, supporting our purpose to 'Boldly Grow the Good' in business and life," he said.

Tom Unger is a freelance writer and business writing instructor. Based in the Portland metro area, he has contributed many articles to *Banking Matters* over the years. He can be reached at tomunger@comcast.net.

Sam and Rita Isaac with their daughters Ava (left) and Mila. (photo by Karisa Williams)