FERGUSON WELLMAN CAPITAL MANAGEMENT

ASSOCIATE WEALTH PLANNER

About Ferguson Wellman
Founded in 1975, Ferguson Wellman Capital Management is a privately owned registered investment advisory firm established in the Pacific Northwest. The firm manages over $11.7 billion for approximately 1,100 clients, including individuals and families; Taft-Hartley and corporate retirement plans; and endowments and foundations with portfolios of $4 million or more. West Bearing Investments, a division of Ferguson Wellman, serves clients with assets starting at $1 million or more (data as of September 30, 2026). We have offices in Portland, Oregon, Bellevue and Vancouver, Washington.

About the position:
We are seeking a motivated and detail-oriented Associate Wealth Planner to join our wealth management team. This individual will support the delivery of comprehensive financial planning services to clients. This individual is expected to build and manage straightforward planning cases from start to finish, including data gathering, analysis, preparation of recommendations, and follow-up coordination. This role works with review from more experienced planners or advisors and may present recommendations in selected client meetings. This individual will also support department-wide initiatives, process improvement, planning content coordination, and innovation efforts that strengthen the team's effectiveness and client service.

Responsibilities:
- Gather, organize, and maintain client information needed to prepare financial plans and update CRM records according to firm standards.
- Build and present straightforward financial plans, including analysis, recommendations, follow-up coordination, and appropriate escalation of more complex issues.
- Collaborate with senior wealth management team members on more complex cases and contribute to plan development, analysis, and recommendations.
- Attend client meetings as requested; prepare notes, draft follow-up, update client files, and present selected planning recommendations based on case complexity and experience.
- Perform research and analysis in areas of financial, tax, and estate planning to support client planning needs.
- Contribute to department initiatives, process improvement, planning content, communications, and software vendor coordination in support of an effective planning function.
- Engage in ongoing professional development to strengthen expertise and support high-quality client service.
- Other duties as assigned.

Qualifications:
- One to three years of experience in financial planning, wealth management, or a related advisory support role.
- Bachelor's degree required.
- CFP® designation required.
- Familiarity with planning software such as MoneyGuidePro, Holistiplan and Microsoft Office Suite.
- High standards of professionalism, ethics, and integrity.
- Strong communication skills, both written and verbal.
- Process-oriented with superior attention to detail and follow-through.
- Excellent customer service talent and experience working in a fast-paced, team-based, highly professional environment.

Compensation and Benefits:
- Salary to be consistent with experience and potential. Range from: $85,000 to $115,000.
- Benefits for this exempt position include an annual discretionary bonus, profit-sharing contribution, insurance (medical, dental, vision, life, and long-term disability), personal time off (PTO) and remote workdays (RWD), donation reimbursement, tuition reimbursement, Costco membership and paid monthly parking

Ferguson Wellman recruits, employs, trains, compensates, and promotes regardless of race, color, religion, national origin, gender, gender identity or expression, sexual orientation, disability, age, veteran status, and other protected status as required by applicable law.

Please submit a cover letter and resume to Scott Christianson at scott.christianson@fergwell.com