



FERGUSON WELLMAN

CAPITAL MANAGEMENT

CLIENT RELATIONSHIP ASSOCIATE

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 \$10.6 billion for 1000 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 December 31, 2025).

About the Position

The Client Relationship Associate (CRA) position is a full-time, on-site position, including benefits and is located in Portland, Oregon. The ideal applicant should be passionate about providing a positive client service experience while developing and maintaining those relationships. This position may be filled at the CRA, Lead CRA or Senior CRA level, depending on the candidate's experience and qualifications. While core responsibilities remain consistent, expectations increase with level, including greater independence, leadership and contribution to strategic and cross-functional initiatives.

Responsibilities:

- Compile information and prepare account paperwork for new and existing clients
- Maintain and update information in CRM database according to firm standards
- Prepare meeting and quarterly client reports
- Assist clients with annual IRA distributions, provide tax information, facilitate gifting, and satisfy money movement requests (wires, checks, transfers)
- Provide administrative support to portfolio managers as needed
- Build relationships with clients and maintain proactive communication
- Monitor manager calendar, travel arrangements, and schedule client meetings
- Attend client meetings at the manager's request
- Travel may be required

Qualifications:

- Strong communication skills, both written and verbal
- Superior attention to detail and follow through
- Strong organizational and time management skills
- Proficient in Microsoft Office, Schwab Advisor Services platform, DocuSign, CRM
- Experience working in a fast-paced, highly professional environment
- College degree with 3-5 years financial industry experience preferred
- Team player with the ability to manage projects, solve problems and meet deadlines

Compensation and Benefits:

- Salary to be consistent with experience and potential, with typical starting salary from \$70,000 to \$80,000. This role may be filled at multiple levels, compensation will vary accordingly.
- Benefits for this non-exempt position includes an annual discretionary bonus, profit-sharing contribution, insurance (medical, dental, vision, life and long-term disability), personal time off (PTO) and remote work days (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: Katie Fairris at katie.fairris@fergwell.com