



# FERGUSON WELLMAN

## CAPITAL MANAGEMENT

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### CLIENT RELATIONSHIP ASSOCIATE

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#### About Ferguson Wellman

For more than 48 years, our firm has designed and managed customized investment portfolios for high-net-worth individuals, families, corporate retirement plans, endowments, and foundations. As of December 31, 2023, we manage \$8.4 billion for 990 clients in more than 30 states, making us one of the largest registered investment advisers in the country. We have offices in Portland, Oregon, and Bellevue, Washington.

#### About the position

The Client Relationship Associate position is a full-time 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.

#### 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

#### 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, ranging from \$60,000 to \$65,000
- 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, cell phone allowance 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 Graham at [katie.graham@fergwell.com](mailto:katie.graham@fergwell.com) Job posted 1/2024