FERGUSON WELLMAN
CAPITAL MANAGEMENT

WEST BEARING INVESTMENTS
a division of Ferguson Wellman

VICE PRESIDENT OF PLANNING

About Ferguson Wellman and West Bearing
Founded in 1975, Ferguson Wellman Capital Management is a privately-owned registered investment advisory firm, established in the Pacific Northwest. For more than 45 years, our firm has designed and managed customized investment portfolios for high- net-worth individuals, families, corporate retirement plans, endowments and foundations. Our wealth management team provides meaningful planning resources suited to address all our individual and family clients' needs leveraging the expertise of a team of advisors and planners with decades of wealth management experience. As of December 31, 2020, we manage $6.85 billion in assets for 884 clients.

About the Position
We are looking for a professional who is passionate about advancing client goals through wealth planning and is eager to serve as part of an established and skilled wealth management team. This VP of Planning will prepare and participate in the presentation of wealth plans and contribute to the firm's wealth management structure under the leadership of the wealth management committee. The role includes proactive collaboration with portfolio managers and client relationship associates in addition to wealth management colleagues. Hardworking, organized, detail-oriented and driven by a desire for excellence are essential attributes. The ideal candidate will be knowledgeable in financial planning and committed to contributing to, and learning from, a team focused on delivering outstanding wealth planning experiences for clients.

Responsibilities
- Prepare and participate in delivery of financial plans to high-net-worth clients as part of a skilled team.
- Ensure plan status, workflow and documentation is completed in accordance with policy and procedure.
- Collaborate with portfolio managers and client relationship associates on collection of client information and delivery of financial plans.
- Work with wealth management leadership to implement projects and maintain existing processes.
- Contribute to wealth management communications including newsletters, strategy content and events.
- Assist in the coordination of firm-wide financial planning initiatives.
- Advance the integration and use of financial planning software and other technologies.
- Seek regular professional development opportunities to enhance planning for our clients.
- Help deliver an exceptional wealth management experience to high-net-worth clients.

Qualifications
- Three to five years of experience in financial planning or related planning field
- Bachelor's degree required. Degree in business, finance, or related field preferred.
- Advanced designation strongly preferred (CFP®, JD, CPA, PFS)
- Proficiency with planning software (e.g. MoneyGuidePro, eMoney, NaviPlan) and Microsoft Office Suite
- High standards of professionalism, ethics and integrity
- Strong professional communication skills, both written and verbal
- A highly organized and process-driven approach, with a strong attention to detail
- Outstanding interpersonal communication, collaboration skills, and leadership abilities
- An ability to thrive with change and manage others through change

Compensation and Benefits
- Attractive salary and bonus, consistent with experience.
- Additional benefits include but are not limited to health, life and disability insurance, profit-sharing plan, parking allowance, paid vacation days and paid stock market closuredays.

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 email a cover letter and resume to: *Samantha Pahlow* employment@fergwell.com