



FERGUSON WELLMAN

CAPITAL MANAGEMENT

OPERATIONS ASSOCIATE

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 operations associate role is a full-time position, with competitive benefits, in our private family office division called Octavia Group. This position works out of our Portland office and is focused primarily on expense management services for affluent individuals and families. The ideal applicant should be highly detail-oriented, organized, collaborative and comfortable talking with clients.

Responsibilities:

- Perform personal bookkeeping and bill paying duties and create invoices for services rendered
- Generate cash flow analysis and financial statements monthly as related to bill paying activity and asset tracking
- Create predictable, trackable and scalable work processes to engineer efficiency in daily tasks
- Resolve client inquiries on bill paying services and other client needs
- Assist with executing other private family office services as required
- Provide periodic support services for two senior vice presidents in Octavia Group

Qualifications:

- Two years bookkeeping experience, including accounts payable and financial report development preferred
- Experience with QuickBooks and Bill.com preferred, being tech savvy is required
- Intermediate skills in MS Office required, especially in Excel
- Work independently, manage multiple priorities and meet competing deadlines with accuracy
- Maintain a high level of client service and confidentiality with integrity and professionalism
- Demonstrated experience working in a fast-paced, highly professional environment

Compensation and Benefits:

- Salary to be consistent with experience and potential, ranging from \$60,000 to \$65,000
- Benefits for this non-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: Kirstin Havnaer at kirstin.havnaer@fergwell.com | Job posted 5/7/24