



FERGUSON WELLMAN

CAPITAL MANAGEMENT

ONBOARDING 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 onboarding associate position is a full-time position, including benefits and is in Portland, Oregon. The main responsibilities of this position are to onboard new clients to the firm, prepare all required paperwork to open and transfer accounts, communicate regularly with various stakeholders, and provide a consistent and welcoming experience for all clients.

Responsibilities:

- Develop relationships with new clients by phone and email to welcome them to our firm
- Compile information and prepare account paperwork for clients
- Create reports to track timeline and accuracy of existing processes
- Communicate with client relationship associates and portfolio managers regarding status of client accounts
- Work with the client relationship associate team to support other functions as needed
- Other duties as assigned

Qualifications:

- Demonstrate ability to work in a team environment, adapt to frequent task changes, solve problems and interact with professionals at varying levels of management and expertise
- Strong communication skills, both written and verbal
- Superior attention to detail and follow through, process oriented
- Proficient in Microsoft Office, DocuSign, CRM, Schwab Advisor Services platform
- Excellent customer service talent and experience working in a fast-paced, highly professional environment
- Willing to handle routine tasks with a positive attitude

Compensation and Benefits:

- Salary to be consistent with experience and potential, ranging from \$55,000 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, 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 Job posted 3/2024