



FERGUSON WELLMAN

CAPITAL MANAGEMENT

EQUITY TRADER

About Ferguson Wellman

For more than 47 years, our firm has designed and managed customized investment portfolios for high-net-worth individuals, families, corporate retirement plans, endowments and foundations. As of January 1, 2023, we manage \$7.1 billion for 943 clients in 36 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 Equity Trader position will be responsible for conducting trading and rebalancing activity across a variety of taxable, tax-exempt, individual, and institutional accounts. The role also requires contribution to Trading department goals on a daily, monthly, and as needed basis on behalf of our clients. The successful candidate will be detail-oriented, have excellent communication skills, and be an enthusiastic and integral member of our Trading team. This position will be based in Portland, Oregon.

Responsibilities

- Trade equities, mutual funds, and ETFs across multiple asset classes and geographies
- Efficiently complete daily trading tasks and checklists
- Work closely with internal portfolio managers to invest cash and rebalance accounts
- Establish relationships with external traders to facilitate trade execution
- Monitor account-specific portfolio characteristics and restrictions including cash levels and tax gains/losses
- Work with internal and external Operations contacts to facilitate efficient trade settlement

Qualifications

- Minimum of one year prior experience in investment management or capital markets
- Bachelor's degree in finance, business, mathematics or related combination of education and experience
- Exceptional computer skills including advanced proficiency with Excel. Familiarity with trade order management systems (EZE), portfolio accounting systems (APX) and financial information platforms (Refinitiv, Bloomberg) preferred
- Ability to manage multiple priorities in a fast-paced environment
- Perform special projects or other duties as necessary to support the Trading department and the firm

Compensation and benefits

- Salary to be consistent with experience and potential, ranging from \$70,000 to \$100,000
- Benefits for this 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 work days (RWD), donation reimbursement, tuition reimbursement, cell phone allowance, 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: Blaine Dickason at blaine.dickason@fergwell.com Job posted 10/2023