



FERGUSON WELLMAN

CAPITAL MANAGEMENT

EQUITY TRADER

About Ferguson Wellman

Founded in 1975, Ferguson Wellman Capital Management is a privately owned registered investment advisory firm established in the Pacific Northwest. The firm manages over \$9 billion for 1,050 clients, including individuals and families; Taft-Hartley and corporate retirement plans; and endowments and foundations with portfolios of \$4 million or more. West Bearing Investments, a division of Ferguson Wellman, serves clients with assets starting at \$1 million or more (data as of June 30, 2025). We have offices in Portland, Oregon, and Bellevue, Washington. Our mission is to achieve *investment excellence* and earn *lifelong relationships* for the clients and communities we serve.

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 successful candidate will be detail-oriented, have excellent communication skills and be an enthusiastic and integral member of the trading team. This position is onsite and full-time at our Portland office. As with every position in our firm, this hire is expected to uphold our core values: exceed expectations, act with uncompromising ethics and reliability, advocate innovation and manage change, foster a collegial environment and enjoy the journey.

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
- Special projects and other responsibilities as needed

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 (FactSet, Bloomberg) preferred
- Ability to manage multiple priorities in a fast-paced environment

Compensation and benefits

- Salary to be consistent with experience and potential, ranging from \$75,000 to \$100,000
- Benefits for this exempt position include an annual discretionary bonus, profit-sharing contribution, insurance (medical, dental, vision, life & long-term disability), PTO and remote work days (RWD), paid stock market closure days, donation reimbursement, tuition reimbursement 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 09/2025