



FERGUSON WELLMAN
CAPITAL MANAGEMENT

INVESTMENT OPERATIONS ANALYST

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 \$5.96 billion for 878 clients that include individuals and families; Taft-Hartley and corporate retirement plans; and endowments and foundations with portfolios of \$3 million or more. West Bearing Investments, a division of Ferguson Wellman, serves clients with assets starting at \$750,000 (data as of June 30, 2020).

About the position

The Investment Operations Analyst is a dynamic role that will work side-by-side with the IT department by enhancing, replacing and/or migrating core business systems and procedures within the Investment Operations and Trading departments. The ideal candidate will have considerable technology and process management experience within the realm of trading and investment operations, including the ability to identify and define process improvement opportunities, create interim solutions using readily available data administration tools (Excel, Access, etc.), and oversee the development and implementation of system-based solutions to automate and improve processes when needed.

Responsibilities:

- Identify inefficiencies and establish system/process improvement goals and objectives for the Investment Operations function
- Gather and document workflows, business/functional requirements and use cases for design, testing, quality assurance and deployment
- Partner with IT and the business to design, test and implement application-based solutions
- Participate in a firmwide, multi-year project to replace core business systems
- Manage various phases of the software development life cycle as development and enhancement needs arise within Investment Operations and Trading
- Coordinate project meetings with management, subject matter experts and end users to solicit business and functional requirements
- Proactively communicate application development updates and keep the business informed of project progress, delays, changes and shifting priorities

Qualifications:

- 5+ years' experience in the Investment or Wealth Management industry
- 3+ years' technical/functional experience in one or more of the following business units:
 - Trading, Investment Operations, Research, Portfolio Engineering and/or Compliance
- Strong organizational and analytical skills; must be detail-orientated
- Excellent interpersonal skills and ability to thrive in a collaborative environment

- Considerable experience using data administration tools such as Microsoft Excel, Access, VBA, SQL, SSRS, etc. to conduct analysis and build interim process solutions as needed
- Analyst experience within Trading or Investment Operations a plus
- Experience using any of the following a plus:
 - Microsoft Dynamics CRM, FIN, Axys, Black Diamond, Bloomberg, Factset, Eze or other trading technology
- Technical writing (functional requirements)
- Project management

Compensation and Benefits:

- Salary range for this position is 85k-90k base. Salary to be consistent with experience and potential
- Benefits include insurance (medical, dental, vision, life & disability), club dues and a parking allowance
- Additionally, discretionary annual bonus and profit-sharing contribution are available contingent on firm performance

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:

Michael Garcia, Chief Technology Officer
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