



## FERGUSON WELLMAN

CAPITAL MANAGEMENT

- 
- Celebrating our 43<sup>rd</sup> year in business
  - Privately-owned
  - 798 clients
  - \$5.1 billion under management (as of 12/31/17)
  - \$3 million minimum investment
  - 19 portfolio managers
  - 23-year average investment experience
  - No investment staff turnover in 27 years
- 

As a 43-year-old, employee-owned, registered investment adviser, Ferguson Wellman Capital Management provides wealth management services to individuals and families; and investment management services to institutions such as endowments, foundations and retirement plans. We specialize in building and managing customized portfolios in excess of \$3 million using individual securities in separately managed accounts.

### FERGUSON WELLMAN'S WEALTH MANAGEMENT HIGHLIGHTS

- Our investment team consists of 19 portfolio managers and analysts with an average of 24 years of investment experience. Over the past 29 years, with the exception of retirement, we have retained all of our investment professionals.
- We are 100 percent employee-owned with 32 of our 47 employees having ownership in the firm. In addition, the portfolio managers have invested their personal retirement assets alongside of our clients' assets.
- We actively manage the following strategies: *Core Equity, Dividend Value, International Equity, Municipal Bonds, Core Fixed Income, and Intermediate Fixed Income*. We also provide access to top-tier investment managers for our *Small-Cap Equity, Alternative Investments* and *Real Estate* mandates.
- We offer a suite of wealth management services for individuals that includes: financial planning, tax and estate guidance, investment education, charitable giving and client advocacy.
- We provide personalized, investment portfolios with institutional quality investment management through the use of individual securities to effectively manage both tax liability and risk.
- Our portfolio managers are very accessible to our clients, thus facilitating "bottom-up" portfolio construction tailored specifically to our clients' needs.

---

*Ferguson Wellman Capital Management  
888 Southwest Fifth Avenue, Suite 1200  
Portland, Oregon 97204-2026  
(503) 226-1444  
[www.fergusonwellman.com](http://www.fergusonwellman.com)*

---