



FERGUSON WELLMAN  
CAPITAL MANAGEMENT

For Immediate Release  
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## Ferguson Wellman Nationally Ranked and Only Portland-Area Firm on Top RIA List

**PORTLAND, Ore. - May 31, 2011** - Ferguson Wellman Capital Management was recognized by *InvestmentNews* in their May 30 issue as one of their "RIA Giants." The publication listed the top fee-only registered investment advisers ranked by discretionary assets under management.

Ferguson Wellman was 18th nationally and sixth in the western region. The firm was one of two from Oregon and the only company in the Portland area to receive recognition. Ranking was based on discretionary and total assets under management; total accounts and clients; and number of employees and investment advisers.

"We appreciate this annual ranking because it is very closely aligned to our business model," said Principal and Chief Operating Officer Steve Holwerda, CFA. "Often we are categorized in rankings with other companies that may not be solely focused on investment management for individual and institutional clients."

Some of the methodology for this national ranking included not being a broker or dealer; and 50 percent of the business focused on portfolio management and financial planning.

Founded in 1975, Ferguson Wellman Capital Management is a privately owned investment advisory firm, established in the Pacific Northwest. With more than 550 clients, the firm manages \$2.9 billion in assets that comprise union and corporate retirement plans; endowments and foundations; and individuals (as of 3/31/11). Ferguson Wellman's minimum account size is \$2 million.

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Complete award methodology: Dates are as of March 31. RIA Database qualified and ranked RIA firms based on discretionary assets under management as defined by the Securities and Exchange Commission. Firms were included based on the following criteria: (1) Greater than 50 percent of the business must serve the retail marketplace. (2) They must provide financial planning services or portfolio management for individuals, or conduct due diligence on third-party advisers. (3) They must not be doing business as a broker-dealer. (4) They must not charge commissions, and must not have registered representative employees at the firm. (5) The RIA must provide wealth management services. (6) A dominant portion of the RIA business must not be proprietary products. Ranking is not considered an endorsement to any firm listed in the *InvestmentNews* publication.