



FERGUSON WELLMAN  
CAPITAL MANAGEMENT

For Immediate Release  
Mary Faulkner · (503) 226-1444 · faulkner@fergwell.com

---

## Coats Promoted to Senior Vice President

**PORTLAND, Ore. – April 25, 2011** – Ferguson Wellman Capital Management is pleased to announce that Jim Coats has accepted an invitation from the Board of Directors to purchase additional shares in the firm. In this process, he was also promoted to senior vice president.

“After five years of helping us grow our business, we felt it was time for Jim to have a larger equity stake in Ferguson Wellman,” said Mark Kralj, principal.

Coats joined the firm in 2006 as vice president of business development. He has been instrumental in growing our individual and institutional client base, particularly in Boise, Idaho and Spokane Washington. Coats has also provided extensive analysis on evaluating investment strategies the firm would not manage internally. He also works closely with clients utilizing the firm’s *Asset Allocation Modeling* – and one of Ferguson Wellman’s seven investment services. In addition to business development, Coats will start serving in a client-service role for new institutional accounts.

Prior to joining the firm, Coats was working for R.V. Kuhns & Associates in Portland, Oregon as an associate consultant. Upon completing a master’s degree with a concentration in international finance from Columbia University in 2001, Coats joined Morgan Stanley Capital International in New York City as a hedge fund index product manager and business development associate. Coats graduated from Oregon State University with a B.A. in communications and a minor in Chinese. During his undergraduate studies, he studied at the Beijing University of Minority Nationalities and later taught English at the Shanghai University of Finance and Economics.

Coats currently serves as treasurer and is on the board and finance committee of the Boys and Girls Clubs of Portland.

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. Minimum account size: \$2 million. (as of 3/31/11)

###