



EXECUTIVE APPOINTMENTS INTEREST FORM



Please check if this is an application for
reappointment ☐

This form is an application for an Oregon Board or Commission. To complete your application packet, return this form to the Governor's Office, along with your resume, a statement of interest and a bio. You must be an Oregon resident to apply unless otherwise noted. Please contact the Executive Appointments office at (503) 378-6829 if you have any questions.

Options to Return Application Packet:

Mail: Executive Appointments, Office of the Governor 900 Court Street NE, Suite 254, Salem, OR 97301-4075

Email a PDF to: executive.appointments@oregon.gov

Note: This application is subject to the Public Records Act and may be disclosed upon request. Personal information will be redacted.

Board/Commission Appointment(s) Desired: (Please print or type)

University of Oregon Board of Trustees

(Board Name)

Trustee

(Position)

(Board Name)

(Position)

(Board Name)

(Position)

First Name: Steven MI: J Last Name: Holwerda

Preferred Name: Steve (Ex: Thomas -> Tom) Title: (Mr. Ms. Dr.) Mr. Suffix: (Jr., PhD) _____

Permanent Address: _____

City: Lake Oswego State: OR Zip Code: 97034 County (not USA): Clackamas

Cell Phone: _____ Work Phone: _____ Home Phone: _____

Email Address: _____

State Senate District #: 19 State House District #: 38 Federal Congressional District #: 5

This is your residential voting district. Click here - <https://www.oregonlegislature.gov/findyourlegislator/leg-districts.html> - or call your county elections office.

To better assist us in meeting our affirmative action objectives, we would appreciate information about your gender identity and background. This information is optional and is used for data collection only. Under state and federal law, this information may not be used to discriminate against you. Thank you for your participation.

Gender Identity: Male LGBTQ: ☐ Disability: None

Race/Ethnicity (Select One): African American/Black ☐ American Indian/Alaskan Native ☐ Asian ☐
Caucasian/White ☒ Hispanic/Latino ☐ Native Hawaiian/Pacific Islander ☐
Multi/Other ☐

REMINDER: A complete application packet contains an Interest Form and Executive Appointments Background Information form, as well as your resume, a statement of interest and a short bio.

STEVEN J. HOLWERDA, CFA

Managing Director

Steve Holwerda, CFA, joined Ferguson Wellman in 1989 and serves as managing director of the firm. Holwerda is a portfolio manager with clients concentrated in Portland, Vancouver, Eugene and Medford.

Prior to joining Ferguson Wellman, Holwerda was a regional director for the University of Oregon athletic department and a national director for the NCAA Volunteers for Youth. Raised in South Dakota, Holwerda earned his B.S. in economics from South Dakota State University and an M.B.A. from the University of Oregon. He is a member and past president of the Chartered Financial Analysts Society of Portland.

Holwerda has served as president or chairman for numerous community and nonprofit boards including the University of Oregon Foundation, Portland Business Alliance, Portland Golf Club and Boys and Girls Club of Portland, among others. He was awarded the William S. Naito Service Award in 2014 by the Portland Business Alliance for his community leadership. Presently, he serves as a board member of the Portland Art Museum and is also a trustee of Pioneer Courthouse Square.

Steve grew up in South Dakota but has been an Oregonian since 1985. He and his wife, Kasey, live in Lake Oswego and have three grown children. He enjoys college athletics, golf, hunting and collecting antique mechanical banks.

Steve James Holwerda

[REDACTED] Lake Oswego, OR 97034

(work) [REDACTED]

(cell) [REDACTED]

EXPERIENCE

JANUARY 1989 to PRESENT

MANAGING DIRECTOR, FERGUSON WELLMAN CAPITAL MANAGEMENT

Started my career at Ferguson Wellman as Vice President of marketing and sales. In 1994 I became a Sr. Vice President and transitioned to portfolio management working directly with clients to meet their investment goals, which I continue to do to this day. My partners and I purchased the firm from the founders in 1997 and at that time I became our Chief Operating Officer with management duties running our firm. My client facing portfolio management responsibilities continued. At the end of 2019 my title was changed to Managing Director with the same company management responsibilities.

1989 to 1993 – Vice President of Marketing and Sales

1994 to 1997 – Sr. Vice President, Portfolio Manager

1997 to 2019 – Principal, Chief Operating Officer

2020 to present – Managing Director

SEPTEMBER 1985 TO DECEMBER 1988

REGIONAL DIRECTOR DUCK ATHLETIC FUND, UNIVERSITY OF OREGON

Hired to establish the first satellite fundraising office for the University of Oregon athletic department in Southern Oregon. Recruited potential donors, organized and implemented the annual regional fundraising campaign, provided a contact and resource for local Duck fans, and created the first golf and auction fundraising event in Southern Oregon. Spent the last two years running the Portland satellite office and fulfilling the same responsibilities but on a larger scale.

JUNE 1984 TO AUGUST 1985

NATIONAL DIRECTOR VOLUNTEERS FOR YOUTH, NCAA

Volunteers for Youth was a one on one friendship program between student athletes and junior high school kids with low self-esteem. There were 43 universities in the country with the program, which was run locally by student athletes on campus. Each year the NCAA would hire 5 recent graduates who ran a local university program to be national directors. Our job was to visit each of the 43 schools for 3 to 5 days, meet their student directors, faculty representatives, evaluate their program, assist with their structure and help grow the program.

EDUCATION & DESIGNATIONS

MAY 1984

BACHELOR OF SCIENCE, COMMERCIAL ECONOMICS, MINOR IN COMPUTER SCIENCE, SOUTH DAKOTA STATE UNIVERSITY

MAY 1991

MASTER OF BUSINESS ADMINISTRATION, UNIVERSITY OF OREGON

SEPTEMBER 1994

CHARTERED FINANCIAL ANALYST

ACTIVITIES & AWARDS

Portland Society of Financial Analysts, President of the Board, 1999/2000

Boys & Girls Club, President of the Board, 2000

Lake Oswego Schools Foundation, President of the Board, 2005

Portland Business Alliance, Board Chair, 2008/2009

YPO Oregon, Chapter President, 2009/2010

Elevate Oregon, President of the Board, 2011/ 2013

William S. Naito Outstanding Service Award, 2014

University of Oregon Foundation, Board Chair, 2014/15 & 2015/2016

Portland Golf Club, President, 2019

Portland Art Museum, Trustee, 2012 – present

Pioneer Courthouse Square, Trustee, 2014 to present



FERGUSON WELLMAN CAPITAL MANAGEMENT

Investment Excellence • Lifelong Relationships

March 4, 2020

Governor Kate Brown
c/o Executive Appointments Director
Via Electronic Submission Only

Dear Governor Brown:

I respectfully submit my application for appointment to the University of Oregon Board of Trustees. The opportunity to serve our State and the U of O in this capacity would be an honor and a privilege. My interest in the position is grounded in my belief in higher education as an economic engine for our state, the important path a college degree paves for graduates, and my personal experience with the University since 1985.

Over the last 35 years I have been an employee, volunteer, student, graduate, and Foundation trustee and officer at the University of Oregon. I was hired to the development staff in the Fall of 1985 to open and run a satellite office in Southern Oregon for the athletic department. After 15 months I was promoted to the Portland office where I worked for two years. Upon leaving the University to work in the investment industry, I enrolled in the University of Oregon's executive MBA program and proudly graduated in 1991.

Over the next twenty years I volunteered as a fundraiser, served on the Pioneer Award Committee for more than a decade, was a guest lecturer on numerous occasions at the business school and remained an active, vocal advocate for the University. My involvement increased significantly in 2007 when I was invited by the Foundation to serve as a trustee. It was a humbling appointment considering my admiration and respect for Foundation trustees from my employment as a young fundraiser 30 years prior. I served as Chair of the Foundation board in 2015 and 2016 to complete my 10 years on the board. The access gained from this role to information, programs, people, challenges and successes provided an in-depth understanding of the University. Interestingly, it was during my term at the Foundation Board that the University of Oregon Board of Trustees was created.

Finally, the University of Oregon is a family affair. My wife, Kasey Brooks Holwerda, completed her undergraduate degree in 1986 and her Juris Doctorate in 1989. She was elected as student body president in 1988 and served on the State Board of Higher Education during her term as ASUO president. We have three grown children, and our youngest, Sina, graduated from the U of O music school last June. We are delighted to have a second-generation Duck in the family.

March 4, 2020

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I believe my experience is well suited to benefit the U of O as it continues to advance its mission as a public institution. Its work to provide access to Oregonians, educate future generations, and serve the state holistically are goals I admire and would enjoy fostering. As noted, two generations of my family were fortunate enough to benefit from a wonderful U of O experience...I am deeply committed to ensuring others have the same opportunity.

Thank you for your consideration. I would be honored to serve if you feel my qualifications and background will be an asset to the University.

Sincerely,

A handwritten signature in black ink, appearing to read 'S. Holwerda', with a large, stylized initial 'S'.

Steven J. Holwerda
Managing Director