

**Appleton Partners Introduces Municipal Impact Strategy  
Offers HNW Investors a Unique Impact-Driven Value Proposition**

**For Immediate Release - Boston (June 1, 2021)** - Appleton Partners, a \$12 billion investment advisor<sup>1</sup>, has introduced a separate account strategy offering investors an ability to direct capital to American communities where it is needed while potentially enhancing tax-exempt income and total return.

The Municipal Impact strategy seeks to identify bond issuers exhibiting relatively weak socioeconomic characteristics that may be poised to realize development momentum. Appleton Partners assesses issuer specific impact potential through a proprietary 8-Factor model. All bonds must be investment grade and approved by Appleton credit research to be eligible for purchase.

“Municipal Impact represents a new approach to community level investing. Our issuer specific Impact Scores allow us to pursue measurable outcome objectives rather than simply screening out or targeting certain bonds,” said Nathan Harris, CFA®, Co-Director, Municipal Research and Municipal Impact Portfolio Manager. “Our investment process demands four attributes - impact potential, development catalysts, fundamental credit quality, and relative value, all in an effort to foster positive impact while generating attractive long-term performance.”

The strategy can complement or replace a core municipal bond portfolio and is accessible through registered investment advisors, family offices, private banks, and other wealth management platforms.

***About Appleton Partners***

Appleton Partners manages more than \$12 billion in separately managed and private client accounts. The firm’s expertise in municipal fixed-income management includes short, intermediate, long, impact, crossover, and ladder strategies. With an emphasis on customization for individual clients, Appleton Partners invests in high-quality, liquid securities identified through rigorous proprietary research. For more information, please see [www.appletonpartners.com](http://www.appletonpartners.com).

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1. As of May 3, 2021

President and Chief Executive Officer