

### ***Appleton Partners Announces Changes and Addition to Municipal Research Team***

**For Immediate Release - Boston (June 1, 2021)** - Appleton Partners, a \$12 billion investment advisor<sup>1</sup>, announced today that Janet Kelliher, after a distinguished career in the municipal markets, will be retiring effective June 30, 2021. Nathan W. Harris, CFA<sup>®</sup>, currently Co-Head of Municipal Research with Janet, will be assuming sole leadership of the department at that time. We are also pleased to announce that Jason Apruzzese, CFA<sup>®</sup> has joined the firm as a Vice President.

Janet joined Appleton in 2009 from Wellington Management Company and has played an integral role developing and implementing Appleton's municipal credit research capabilities. She is an active member of the National Federation of Municipal Analysts and the Boston Municipal Analyst Forum.

Nate Harris has been with Appleton since 2012. Over the past 10 years, he and Janet led Appleton's credit research process including issuer specific bond analysis as well as assessment of legislative, regulatory, economic, and fiscal developments. Nate also serves on the Appleton's Fixed Income Investment Committee and is a former President of the Boston Municipal Analysts Forum and a former Board Member of the National Federation of Municipal Analysts.

We welcomed Jason Apruzzese to our Municipal Research team as of June 1, 2021. Jason brings considerable experience and expertise and was formerly with BNY Mellon Wealth Management where he served as Senior Credit Analyst.

"Credit research has long been a core strength of Appleton Partners and a critical driver of our investment success", emphasized Douglas Chamberlain, CFA<sup>®</sup>, the firm's Chief Executive Officer. "We wish Janet the very best in her retirement and thank her for many years of friendship and dedicated service. She and Nate have built an extremely strong team and fundamentally sound credit research process. Bringing Jason on board further enhances our expertise."

#### ***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, municipal impact, crossover, and laddered 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