

Appleton Partners, Inc. is a privately-owned Boston-based registered investment advisor offering a variety of high-quality strategies in the equity and fixed income space. The firm has approximately \$12 billion in assets under management and has seen steady growth since its founding in 1986.

We are seeking a Municipal Bond Research Analyst with 2 - 5 years of relevant credit analysis experience to play an integral role within the Fixed Income team. Reporting to the Director of Municipal Research, the Analyst is expected to conduct fundamental analysis on investment grade municipal bond issuers. The results of that analysis will then be appropriately communicated to the portfolio management team as part of the overall investment making decision process. Research is both quantitative and qualitative, requiring attention to detail, organizational skills, and the ability to infer from a multitude of information sources. Appleton values our collegial atmosphere and the right candidate will have both job-specific qualifications as well as the interpersonal skills to operate in a team-oriented environment.

Key Responsibilities:

- Utilizing both qualitative and quantitative research, provide fundamental analysis on investment grade municipal bond issuers
- Analyst will have ownership of a broad range of municipal sectors and issuers
- Provide timely investment recommendations for portfolio management team on both primary and secondary opportunities
- Actively conduct surveillance of existing credits
- Assist in maintenance of municipal credit database (PERFORM)
- Analysis of prospective and existing client portfolios
- Participate and assist in the production of marketing and sales material
- Perform ad hoc credit related projects when requested

Experience & Skills:

- Bachelor's degree required, preferably with a focus on finance or economics
- 2-5 years of municipal credit research preferred
- Knowledge of the municipal market, fixed income securities, municipal bond offering documents and financial statement analysis
- Chartered Financial Analyst designation - or progress towards - a plus
- Highly motivated self-starter with excellent organizational skills and ability to work both independently and within a team environment
- Strong attention to detail, intellectual curiosity, ability to infer from various sources of information and then make timely and prudent decisions
- Excellent verbal, written and interpersonal skills with the ability to interact with clients, brokers, rating agencies, and peers in a professional manner

Posting Date: July 22, 2022

Contact Information: Interested candidates should send resume and cover letter to:
Michele Hubley at mhubley@appletonpartners.com