

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 an Assistant Portfolio Manager. In this role, responsibilities will focus on service and support for Appleton's Private Client Service team, specifically client service, portfolio administration, and the onboarding of new client relationships. The candidate should be of a professional demeanor, operationally and technically savvy, detail oriented, possess a working knowledge of custodial relationships, securities, banking functions and trust structures.

Key Responsibilities:

- Handling direct inquiries and communication from our private client base; partaking in financial planning and investment conversations with clients.
- Maintaining and providing internal & client reports.
- Setting up new relationships through opening/closing/ transferring of accounts, account conversions, and other duties as needed.
- In this role, the candidate will be an integral part of the Private Client Service team, working closely with the Portfolio Managers, Operations and Compliance.

Experience & Skills:

- Bachelor's Degree
- Minimum of 2 years industry experience
- Experience within a Registered Investment Advisor firm or Financial Services firm
- Strong knowledge of Excel
- Willingness/ability to become proficient with proprietary accounting & trading systems
- Exceptional attention to detail, strong organizational, written, and communications skills. Collaborative demeanor, team player a must
- Self-motivated, ability to juggle multiple projects as well as focus on primary tasks
- Willingness to enroll in the Claritas® Program and other applicable educational courses

Posting Date: July 22, 2022

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