Appleton Partners, Inc. is a 100% employee owned Boston-based SEC-registered investment advisor offering a variety of high quality fixed income separate account strategies. The firm has approximately $12.3 billion in assets under management and has seen steady growth since being founded in 1986. We are currently seeking a team-oriented sales professional who is a self-starter and displays a positive attitude, and a high level of integrity, drive and motivation.

The primary responsibility of the Institutional Sales role is to build relationships with financial advisors and other intermediaries and to raise and retain assets under management in assigned institutional distribution channels.

Key Responsibilities:

- Identifies and cultivates institutional prospects and helps manage existing clients.
- Initiates, conducts and follows up on new business meetings, calls, and other sales opportunities.
- Leads business development in assigned channels and closes sales to financial intermediaries such as registered investment advisors and broker-dealer financial advisors.
- Leverages the organization's relationship with current institutional clients by developing and executing proactive, creative, and ongoing relationship management initiatives.
- Develops and maintains relationships with influential consultants identified by sales management.
- Acts as a liaison to the investment management teams to ensure their active, enthusiastic support of the sales and marketing process.
- Collaborates with Marketing team to identify sales support communication needs and contributes as needed to the development of timely, impactful materials.
- Works collaboratively across business lines with Appleton team members.

Work Experience / Knowledge:

- Minimum 7-10+years of professional experience.
- Relevant experience in asset management or related financial services.
- Must have demonstrated ability to create and close sales/relationship opportunities with clients, prospects and consultants in assigned market segments.
- Must have excellent sales skills and in-depth product and broad investment knowledge.

Skills / Other Personal Attributes Required:

- Strong communication and presentation skills
- Ability to work well with a variety of people at all levels of the organization
- Demonstrated ability to close business
- General understanding of the financial markets and investment vehicles

Education:

Bachelor's degree. MBA and/or CFA preferred

Compensation commensurate with experience and demonstrated track record

Posting Date: March 15, 2023

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