

Appleton Partners, Inc. is a 100% employee-owned and Boston-based SEC-registered investment advisor offering a variety of high- quality fixed income separately managed account strategies. The Firm has \$12.6 billion¹ in assets under management and has seen steady growth since being founded in 1986. We are currently seeking a Boston-based candidate for this permanent position.

Appleton's sole office is located at One Post Office Square in Boston, MA. For additional information, please visit our website at www.appletonpartners.com.

The Assistant Portfolio Manager's responsibilities will focus on service and support for Appleton's Private Client Service team, specifically client service and portfolio administration. 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:

- Handle general inquiries and communication from our private client base, for example; managing cash requests, account conversions and reviews.
- Assist with the execution of trades.
- Maintain and provide internal & client reports, and other duties as needed
- The candidate will be part of an integral part of the Client Service team, working closely with the Portfolio Managers, Investment Team, Operations and Compliance.
- Assist the team with the process of working with the team on behalf of potential and new private clients coming into Appleton.

Work Experience / Knowledge:

- Minimum of 2 years industry experience ideal
- Experience within a Registered Investment Management firm or Financial Services preferred

Skills / Other Personal Attributes Required:

- Strong knowledge of Excel
- Willingness/ability to become proficient with proprietary & 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 single task

Education:

- Bachelor's Degree

Posting Date: February 2024

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

¹ As of 12.31.23

All decisions regarding employees or potential employees at Appleton Partners are based on the ability of the individual to perform the requirements of the position, without regard to personal status or characteristics that are unrelated to the abilities required to do the work. With regard to hiring, retention, training and promotion practices, there is zero tolerance at Appleton for behaviors of exclusion or preference which nullify or impair equality of these opportunities, nor decisions that are made on the basis of personal characteristics, race, color, gender, religion, political opinion, nationality, disability, age, sexual orientation or family situation. Appleton's executive management works with the HR Manager on a formal and informal basis to assure these practices are maintained.