APPLETON PARTNERS, INC.

Vice President Institutional Sales – West Coast

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 billion[1] in assets under management and has seen steady growth since being founded in 1986. We are currently seeking a West Coast 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 primary responsibility of the external Institutional Sales role is to identify opportunities, develop relationships, and achieve targeted sales goals with Financial Advisors, Registered Investment Advisors and other intermediaries in assigned market channels.

Key Responsibilities:

- Identifies and cultivates prospects and/or clients.
- Initiates and follows up on new business opportunities.
- Leads new business meetings and closes through Financial Advisors and other intermediaries.
- Leverages the organization's relationship with existing institutional and intermediary accounts by developing and executing proactive, creative, and ongoing contact initiatives.
- Develops and maintains relationships with home office teams including consulting personnel, research analysts, and branch office management.
- Acts as a liaison to Appleton's investment professionals to ensure active, enthusiastic support of the sales and marketing process.
- Collaborates with Marketing team on product and sales support materials to ensure they are effective for the applicable presentation, conference, or opportunity.

Work Experience / Knowledge:

- Minimum 7-10+years of professional experience.
- Relevant experience in Investment/Wealth Management or Financial Services product distribution.
- Must have demonstrated ability to create sales/relationship opportunities with Institutional and/or Intermediary clients.
- 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.
- 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.

Expected Hire Date: Q2 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.