

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<sup>1</sup> 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 with our marketing team.

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](http://www.appletonpartners.com).

Responsibilities of the Marketing Information Analyst emphasize management of the RFP, consultant and platform database, and due diligence reporting processes. A variety of firm, investment strategy, and related qualitative and quantitative information is provided to institutional partners and other intermediaries in the form of database submissions, RFP responses, and due diligence questionnaires. This includes, but is not limited to, strategy and composite performance and characteristics, holdings, risk statistics, benchmark data, and firm information. The role also involves maintaining and regularly enhancing Appleton's RFP Library, working closely with subject matter experts.

Joining Appleton's team as a Marketing Information Analyst will offer considerable opportunity to gain experience and grow through active involvement in many aspects of the marketing process, including performance management and analysis, sales and marketing support, and other communications initiatives. We are looking for a hardworking, positive, collaborative individual who is looking to accelerate their career trajectory.

The Marketing Information Analyst will interface with colleagues in multiple areas of the company, including Marketing, Performance Analysis and Reporting, Sales, and Operations.

**Work Experience / Knowledge:**

- Minimum of 2 years industry experience preferred, with similar marketing information responsibilities
- Experience within a Registered Investment Management firm or Financial Services preferred

**Skills / Other Personal Attributes Required:**

- Knowledge of Excel and general database proficiency
- Willingness/ability to become proficient with proprietary and external performance and data reporting systems
- Exceptional attention to detail
- Strong organizational, written, and communications skills
- Self-motivation, and ability to juggle multiple projects, as well as focus on single tasks

**Education:**

- Bachelor's Degree

**Expected Hire Date:** Q2 2024

**Contact Information:** Interested candidates should send resume and cover letter to [careers@appletonpartners.com](mailto:careers@appletonpartners.com)

<sup>1</sup> 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.