

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 team-oriented fixed income investment professional who is a self-starter, displays a positive attitude, and a high level of integrity, and motivation.

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 Fixed Income Trader will coordinate and execute bond trading in support of the Firm's management of our tax-exempt strategies. The position requires experience trading municipal bonds, a demonstrated knowledge of the capital markets, as well as quantitative skills and an understanding of the use of technology in fixed income trading. Success in this role will require developing an in-depth understanding of the investment philosophy and process employed in each Appleton fixed income strategy. An ideal candidate will also bring innovative tendencies, a collaborative mindset, and strong communication skills.

Key Responsibilities:

- Primary and secondary market trading of investment grade municipal bonds.
- Work closely with senior management, portfolio managers, credit analysts, and other traders in developing actionable investment opportunities.
- Gathering, analyzing, and disseminate market, sector, and security insight.
- Coordinate with credit research team to ensure that all fixed income securities are approved prior to purchase.
- Ensure trades are executed in a timely and accurate manner.
- Contribute to continuous process improvement in Appleton Partners' fixed income trading capabilities with a focus on execution efficiency, scalability and utilizing impactful trading technology.
- Develop and maintain relationships with broker-dealers through which bond trades are executed.
- Work across business lines with other team members to help manage existing client relationships.

Work Experience / Knowledge:

- Minimum 5 years of fixed income investing and/or trading experience, preferably including direct exposure to the municipal bond markets.

Skills / Other Personal Attributes Required:

- Strong communication and presentation skills.
- An analytical and quantitative mindset as well as comfort level with trading systems and other technology applications.
- Ability to work well with a variety of people at all levels of the organization.

Education:

- Bachelor's degree is required; an additional advanced degree or focus in Finance, Economics, Mathematics or Computer Science is a plus, as is the CFA designation and/or MBA.

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.