Private Client Services Portfolio Manager

Appleton Partners, Inc. is a 100% employee-owned and Boston-based SEC-registered investment advisor serving the wealth management and financial planning needs of high net worth individuals and families, while also managing separate accounts for individual and institutional clients. 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 Boston-based candidate for this permanent position. Appleton's sole office is located at One Post Office Square in Boston, MA. As we expand our Private Client Services team, a resource(s) could be added either in Boston or by establishing a new office in a high growth market well suited to our client base and growth prospects.

Private Client Services

Appleton's Private Client Services business develops customized asset allocation strategies based on a collaborative assessment of client specific risk profile, objectives, and circumstances. These often include balanced portfolios that invest in both equity and fixed income asset classes. Every client is assigned a Portfolio Manager as the primary point of contact who ensures that the overall asset allocation strategy and specific investment portfolios are managed in accordance with strategy guidelines and any client specific parameters or trading restrictions. Each Portfolio Manager is supported by an Assistant Portfolio Manager who assists in servicing the relationship.

Appleton Partners takes a "hands-on" approach in our client relationships emphasizing the use of customizable separately managed accounts in our investment portfolios. We offer comprehensive investment capabilities as well as financial and estate planning, and actively coordinate with outside specialists to best address clients' needs when appropriate. We pride ourselves on a willingness to tailor solutions and are differentiated in part based on the high degree of accessibility to our senior investment and relationship management personnel.

Portfolio Manager Role

Appleton Partners is seeking to bring on a talented, experienced portfolio manager within the Private Client Services business who can help accelerate our growth. Primary responsibilities include:

- Manage client relationships to produce client satisfaction, retention, and growth
- Coordinate provision of all investment and financial planning services
- Monitor client asset allocation and investment strategies
- Conduct regularly scheduled investment portfolio and planning reviews with clients
- Contribute to the equity investment process as a member of the Equity Investment Committee
- Engage in new business development activity in collaboration with colleagues, financial intermediaries, and other parties
- Adhere to all Compliance protocols and other business practices

Desired Characteristics and Expertise

The targeted candidate will bring 15+ years of private client wealth management experience, including a sizeable current book of business, strong relationship and communication skills, and considerable investment expertise. High ethical standards, a demonstrated personal commitment to clients, and a desire to embrace Appleton's culture and processes are also essential.

Education:

- Bachelor's Degree; CFA and/or CFP 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.