

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.

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).

We are seeking a **MUNICIPAL RESEARCH ANALYST** with 2 to 5 years of relevant credit analysis experience to play an important role within Appleton's Fixed Income team. Fundamental research has always been foundational within Appleton's investment process and we seek a candidate that will carry on that commitment of diligent and thorough analysis. Reporting to the Director of Municipal Research, the Analyst will apply both quantitative and qualitative research on investment grade municipal bond issuers, requiring attention to detail and excellent organizational skills. We believe our client focus sets us apart at Appleton. As a result, the Analyst can expect interaction with portfolio managers, traders, sales and marketing as we all work to provide consistent investment results along with high standards of client service. In addition to job-specific skills, the right candidate appreciates the value of teamwork, respect for colleagues and dedication to the firm's growth.

**Key Responsibilities:**

- Utilizing both qualitative and quantitative research, provide fundamental analysis on investment grade municipal bond issuers. This includes timely recommendations for the portfolio management team on both primary and secondary opportunities as well as conducting surveillance of existing holds.
- Ownership of sectors and issuers: The range of ownership will be based on the analyst's experience level and analytical abilities.
- Gather, analyze and disseminate relevant and timely market, sector and issuer-level insight to the Investment Team.
- Work with Marketing and Sales to support analysis of prospective and existing client portfolios, answer client inquiries, and help to develop marketing materials.
- Contribute to continuous process improvement in Appleton Partners' research capabilities with a focus on implementing technology enhancements.

**Work Experience / Knowledge:**

- 2-5 years of municipal credit research preferred.
- A demonstrated dedication to the investment industry with knowledge of the municipal market, fixed income securities, municipal bond offering documents and financial statement analysis.
- Experience working with Investortools' Perform as well as Microsoft Office product suite.

**Skills / Other Personal Attributes Required:**

- Excellent organizational skills and ability to work both independently and within a team environment.
- Strong attention to detail, intellectual curiosity, and confidence in decision-making.
- Developed verbal, written and interpersonal skills with the ability to interact with clients, issuers, brokers, rating agencies, and peers in a professional manner.

**Education:**

- Bachelor's degree required; Chartered Financial Analyst designation, or progress towards, a plus.

**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.