PRIVATE CLIENT SERVICES
DIRECTOR OF BUSINESS DEVELOPMENT

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 $12.8 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.

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 their 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 to client relationships and emphasizes 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 as appropriate to address clients' needs. 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.

Business Development Role

Appleton Partners is seeking an experienced relationship management professional within the Private Client Services business who will help accelerate our growth. Primary responsibilities include:

- Lead business development activity in collaboration with colleagues, business partners, and other parties.
- Present Appleton's Private Client investment and planning capabilities to intermediaries and prospects.
- Develop and implement plans to build Appleton's visibility, presence, and lead generation activity with institutional referral partners.
- Cultivate and manage relationships with attorneys, accountants, and other parties that can be helpful to new business development.
- Collaborate with Portfolio Managers and Marketing in planning and conducting client referral and related marketing initiatives.
- Offer insight and perspective to the product management and development process.
- 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 leadership roles in sales, client service, and product marketing. Candidates must have strong relationship and communication skills, as well as an organized and disciplined mindset. High ethical standards, a demonstrated commitment to clients and business partners, and a desire to embrace Appleton's culture and processes are also essential.

Education:

- Bachelor's Degree; MBA 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 3.31.24

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.