

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.

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.

We are seeking a New Business Onboarding Analyst responsible for managing new accounts workflow ensuring the required paperwork is collected and processed accurately and in a timely manner. Analyst will work closely with various internal teams in providing exceptional customer service to Appleton's institutional client base.

Key Responsibilities:

- Work closely with the Client Service, Sales, and other internal teams on new and existing client relationships
- Work closely with Client Service team and ensure all necessary information is gathered from the client and/or from the firm
- Report processing
- Work with various custodians to ensure proper account set up and data flow
- Update all account data in accounting and other systems
- Work with various custodians to ensure proper account set up and data flow
- Certify all account documentation is received and properly submitted for archiving
- Create and maintain weekly metrics of incoming and outgoing activity
- Work to establish team-oriented atmosphere and help push peers to succeed

Work Experience / Knowledge:

- Competent in Microsoft Office programs, especially Excel
- Familiarity with Advent Software and Perform is a plus
- Strong attention to detail
- Ability to prioritize assignments

Skills / Other Personal Attributes Required:

- Ability to work independently under tight deadlines
- Strong communication skill both verbal and written - to peers and business partners
- Well organized, self-starter with an ability to analyze information
- Strong organizational skills in a fast-paced environment
- Strong interest in starting a career in the investment management industry

Education:

- Bachelor's (4yr) degree w/concentration in Business, Finance, Accounting, or related areas of study is a plus

Expected Hire Date: Q3 2024

Contact Information: Interested candidates should send resume and cover letter to careers@appletonpartners.com

¹ As of 5.31.24

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.