

March 11, 2020

With the effects of COVID-19 unfolding daily, I wanted to share steps being taken at Appleton Partners to ensure the interests of our clients, business partners and employees are protected.

Appleton Partners has long had thorough business continuity/disaster recovery (BC/DR) plans and practices in place and has been carefully stress-testing them in recent weeks. Our business remains fully operational both on site and remotely.

Our BC/DR plan emphasizes steps designed to maintain business as usual in the event of a disruption in the day-to-day environment. Our ability to do so remains intact and senior managers are regularly reviewing departmental BC/DR plans with their respective teams. All Appleton employees are enabled to operate successfully from a remote environment should it become necessary for them to do so. We recently conducted a dry run "Work from Home" plan that confirmed that secure systems access, email, phone and other critical communication links functioned successfully in a remote environment.

Furthermore, Appleton leases space at an offsite disaster recovery center in Marlborough, MA. This is a resource we can draw upon should it be needed to complement individuals working from home.

The health of our employees and well-being of our corporate environment are of the utmost importance. Employees are being kept well informed on recommended workplace and offsite wellness practices. Although no employee to our knowledge has had direct or indirect exposure, or recently traveled to an area of risk, in accordance with public guidance, any employee that feels symptomatic in any way will be asked to work from home.

As you can understand, all non-essential business travel has been temporarily discontinued for precautionary reasons. Like most companies, we are actively leveraging video conferencing and other communication tools. Guests visiting our offices will be screened in advance by us, again by building security, and upon entering our reception area.

Communication is a top priority during uncertain times. We have been regularly sharing our thoughts with clients concerning the economic and market environment, some of which can be found at www.appletonpartners.com/insights. We will continue to offer updates in the coming days/weeks as information becomes more widely available. As always, I invite you to reach out to us at any time. We appreciate your confidence in Appleton Partners.

Best wishes to you and your family.

Best regards,



Douglas C. Chamberlain, CFA
President and Chief Executive Officer