APPLETON *PARTNERS,* INC.

Appleton Partners, Inc. is a privately-owned Boston-based registered investment advisor offering a variety of high-quality strategies in the equity and fixed income space. The firm has over $12 billion in assets under management and has seen steady growth since the inception of the firm in 1986. We are currently seeking a Boston-based candidate for this Permanent Position**.**

INTERNAL SALES

The Internal Sales position shall be responsible for internal sales and relationship development, and business channel management for Appleton's Institutional Fixed Income group. Expectations include partnership and support of the internal and external sales colleagues and maintaining an organized method of tracking key performance indicators and reporting them forward. The successful candidate will maximize client experience, derive a new business pipeline, and contribute to successful opportunities for the institutional investment products. Channel specific coverage includes but is not limited to Broker/Dealer/Platforms, Registered Investment Advisors, Wrap-Fee Sponsors.

KEY RESPONSIBILITIES

- Act as primary internal office contact and liaison to Institutional Sales Team
- Support of external sales colleagues via CRM management, competitive analysis reports, and territory management. Calendar work included as needed.
- Prospect new relationships and business opportunities.
- Build and maintain new business pipeline.
- Prepare client meeting or prospect marketing materials.
- Provide functional and technical support to Sales, Marketing, Portfolio Management, Compliance and various other departments involved in client outcome and experience.
- Develop strong relationships with Institutional contacts.
- Remain abreast of investment portfolio performance and competitive positioning points, with expectations to present opportunistically.
- Provide detailed investment updates to institutional client data base.
- Maintain responsibility for business channel knowledge **(**monitoring key performance indicators (KPIs) for the channel and periodic reporting of KPIs, business pipeline and progress to plan.
- Facilitate, as needed, client meetings, both onsite and in the field.
- Monitor status and success of Requests for Proposal and Due Diligence Questionnaires
- Participate in team projects to enhance best practice execution.
- Ability to maintain onsite presence in Boston office.
- Availability for occasional travel, less than 5%.

EDUCATION & JOB REQUIREMENTS

- Bachelor’s degree required, preferably with a focus on finance or economics.
- Minimum 2 years relevant industry experience in the asset management industry,
- Relevant experience in a client relations or sales environment
- Understanding of sales and marketing process
- Functional knowledge of capital markets
- Strong professional interpersonal and presentation skills
- Ability to package and deliver information in a professional client-friendly manner.
- Ability to be equally productive working independently or with team.
- Possess curious attitude and problem-solving ability.
- FINRA Licenses: Securities Industry Essentials, Series 7, Series 63/65/66 preferred.
- Progress towards professional designations (CFA, CIMA) a plus

CONTACT INFORMATION

Interested candidates should send resume and cover letter to: Careers@appletonpartners.com

PROJECTED DATE OF HIRE

April – May 2021