



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 seeking a Boston-based candidate for this Permanent Position.

MUNICIPAL BOND RESEARCH ANALYST

The ideal candidate for the Municipal Research Analyst role will possess 5 plus years of relevant credit analysis experience to play an integral role as part of the Fixed Income team. Reporting to the Co-Directors of Municipal Research, the Analyst is expected to conduct fundamental analysis on investment grade municipal bond issuers. The results of that analysis will then be appropriately communicated to the portfolio management team as part of the overall investment making decision process. Research is both quantitative and qualitative, requiring attention to detail, organizational skills, and the ability to infer from a multitude of information sources. The Analyst will be a Generalist although specific sector background can be targeted. Appleton values our collegiate atmosphere, and the right candidate will have both job-specific qualifications as well as the interpersonal skills to operate in a team-oriented environment.

KEY RESPONSIBILITIES

- Utilize qualitative & quantitative research, provide fundamental analysis on investment grade municipal bond issuers
- Provide timely investment recommendations for portfolio team on both primary & secondary opportunities
- Actively conduct surveillance of existing holdings
- Monitor and communicate relevant sector and market trends to support the overall investment process
- Aid in the development of marketing materials
- Based on experience, participate in client interactions
- Analysis of prospective and existing client portfolios
- Perform ad hoc credit related projects when requested

EDUCATION & JOB REQUIREMENTS

- 5+ years of municipal credit research. Experience across multiple sectors preferred
- Experience formulating an investment opinion & succinctly delivering that opinion, both in written and verbal format
- Strong knowledge of the municipal market, fixed income securities, municipal bond offering documents and financial statement analysis
- Bachelor's degree required, preferably with a focus on finance or economics
- Chartered Financial Analyst designation or progress towards the designation is a plus
- Highly motivated self-starter; excellent organizational skills; ability to work both independently and with team
- Strong attention to detail, intellectual curiosity, ability to infer from various sources of information and then make timely and prudent decisions
- Excellent verbal, written and interpersonal skills with the ability to interact with clients, brokers, rating agencies, and peers in a professional manner

CONTACT INFORMATION

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

PROJECTED DATE OF HIRE

April – May 2021