APPLETON
PARTNERS, INC.

Appleton Partners, Inc. is a privately-owned Boston-based SEC-registered investment advisor offering a variety of high quality strategies in the equity and fixed income space. The firm has approximately $9.5 billion in assets under management and has seen steady growth since the firm was founded in 1986. We currently have clients across 46 states and abroad. We are currently looking for a team-oriented self-starter who displays initiative and a positive attitude, a high level of integrity, drive and motivation to develop Institutional market opportunities for the role of:

Institutional Sales

The primary responsibility of the Institutional Sales role is to identify opportunities and develop relationships with Institutional investors and investment consultants in assigned institutional market channels.

Key Responsibilities / Duties:

- Identifies and cultivates prospects and/or clients
- Initiates and follows up on new business opportunities.
- Leads new business meetings and closes sales to institutional investors and consultants.
- Leverages the organization's relationship with existing institutional accounts by developing and executing proactive, creative, and ongoing contact initiatives.
- Develops and maintains relationships with sub-advisors and consultants.
- Acts as a liaison to the investment management groups to ensure active, enthusiastic support of the sales and marketing process.
- Collaborates with Marketing team on product and sales materials to ensure they are current and focused for the applicable presentation, conference, or opportunity.
- Works closely with Appleton team members to further develop sales opportunities.

Work Experience / Knowledge:

- Minimum 7-10+years of professional working experience.
- Relevant experience in Investment/Wealth Management or Financial Services is preferred.
- Must have demonstrated ability to create sales/relationship opportunities with clients, prospects and consultants in assigned market segments.
- Must have excellent sales skills and in-depth product and broad investment knowledge.

Skills / Other Personal Attributes Required:

- Strong communication and presentation skills
- Ability to work well with a variety of people at all levels of the organization
- Demonstrated ability to close business
- General understanding of the financial markets and investment vehicles

Education:

- Bachelor's degree. MBA and/or CFA preferred
- Compensation commensurate with experience and demonstrated track record

Projected date of hire:

November 15, 2018.

Contact information:

Interested candidates should send resume and cover letter to: Michele Hubley at Mhubley@appletonpartners.com