Wealth Management Associate

Appleton Partners, Inc. is a 100% employee-owned and Boston-based SEC-registered investment advisor serving the wealth management and financial planning needs of high-net-worth individuals and families, while also managing separate accounts for individual and institutional clients. The Firm has $13.4 billion in assets under management[1] and has grown steadily since being founded in 1986. Appleton's sole office is located at One Post Office Square in Boston, MA.

Wealth Management

Appleton's Wealth Management business develops customized asset allocation strategies based on a collaborative assessment of client specific risk profile, objectives, and circumstances. These often include balanced portfolios that invest in both equity and fixed income asset classes. Every client is assigned a Wealth Manager and Wealth Management Associate, the latter of which focuses on client service and portfolio administration.

Appleton Wealth Management[2] takes a "hands-on" approach to client relationships and emphasizes the use of customizable separately managed accounts. We offer a diversity of investment capabilities as well as financial, estate, philanthropic, and related planning, and coordinate with outside specialists as appropriate to address client needs. We pride ourselves on a willingness to tailor solutions and are differentiated in part based on the high degree of accessibility to our senior investment and relationship management personnel.

Key Responsibilities

Wealth Management Associates support private client relationships in a variety of capacities, including:

- Handling inquiries and client communication such as cash requests, account opening and conversions, service reviews, and related portfolio support requirements.
- Assisting in trade execution
- Maintaining and monitoring client reports and other account documentation.
- Collaboration with Wealth Managers, Operations, Compliance, and other departments.
- Adherence to all Compliance protocols and other business practices.

Desired Characteristics and Expertise

A minimum of 2 years of industry experience is preferred.
Knowledge of and comfort level with Excel and other business software
Willingness and ability to become proficient in proprietary and 3rd party trading and portfolio accounting systems.
Attention to detail, strong organizational and communication abilities, and a collaborative demeanor are essential.

Educational Requirements

Bachelor's degree
Series 65 license is preferred

Expected Hire Date: Q2 2025

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

1. As of January 2, 2025
2. Appleton Wealth Management is a division of Appleton Partners, Inc.

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.