WEALTH MANAGER

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 who directs financial planning services and ensures that asset allocation strategy and each investment portfolio is managed in accordance with strategy guidelines and other specific parameters. Each Wealth Manager is supported by a Wealth Management Associate who assists in servicing the relationship.

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

Key Responsibilities

Appleton Partners is seeking to add a talented, experienced Wealth Manager who can help accelerate our growth. Primary responsibilities include:

- Manage private client relationships that produce client satisfaction, retention, and asset growth.
- Coordinate provision of all investment and financial planning services.
- Monitor client asset allocation and investment portfolios.
- Conduct investment strategy and planning reviews.
- Contribute to the investment process as a member of the Equity Investment Committee.
- Engage in new business development in collaboration with colleagues, financial intermediaries, and other parties.
- Adhere to all Compliance protocols and other business practices.

Desired Characteristics and Expertise

The targeted candidate will bring 15+ years of wealth management experience, including a current book of business, strong relationship and communication skills, and considerable investment knowledge. High ethical standards, a demonstrated commitment to clients, and a desire to embrace Appleton's culture and processes are also essential.

Educational Requirements/Other Information:

Bachelor's degree; MBA, CFA or CFP preferred

Compensation commensurate with experience and demonstrated track record.

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.