



## Form ADV Part 2A - *Summary of Material Changes*

As of March 10, 2023

Appleton Partners, Inc. (“Appleton”) filed its most recent amended Form ADV Part 2A (the “Brochure”) with the Securities and Exchange Commission (the “SEC”) on March 8, 2022. The Brochure provides information about Appleton’s advisory services, qualifications, conflicts of interests and business practices. Appleton is obligated to provide its clients with a summary of any material changes to the Brochure. Additionally, Appleton must either deliver or offer to deliver to its clients the updated Brochure in its entirety. If a client wishes to receive an updated Brochure, Appleton will fulfill this request at the expense of the Firm.

***Please note that there were no material changes to the Brochure since Appleton last filed on November 2, 2022.***

At any time, you may view Appleton’s current Brochure online at the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The SEC’s website provides information about any persons affiliated with the Firm who are registered, or who are required to be registered, as an investment adviser representative of Appleton. You may search the SEC website by using a unique identifying number, known as a CRD number. Appleton’s CRD number is: 110049.

Although Appleton is registered as an investment adviser under the Investment Advisers Act of 1940, as amended, such registration with the SEC should not be construed as an endorsement of any specific skill or training by any regulatory or government agency.

You may request a copy of Appleton’s complete Brochure upon written request to Michael T. Howard, Chief Compliance Officer, at:

Appleton Partners, Inc.  
c/o Legal & Compliance  
One Post Office Square, 5<sup>th</sup> Floor  
Boston, Massachusetts 02109

If you have any questions about the content of this notice, please contact Appleton at (617) 338-0700 or email [mhoward@appletonpartners.com](mailto:mhoward@appletonpartners.com).