



Christine Cox-West, LUTCF

Partner, Financial Services



Partner at The Fortis Agency, LLC, A Financial Services Firm

How long have you been in the financial services industry?

10 years

Where do you currently work?

My firm is called The Fortis Agency. Our office is in Bellworks in Holmdel, NJ, and it's amazing. Check it out on Instagram @Bellworks !

How do you spend most of your time at work?

Most of my time is spent working with clients and helping them reach their financial goals. A significant amount of time is also spent helping other financial advisors find the right solutions for their clients as well by implementing the best products and strategies. As a partner of our firm, I make sure our marketing is relevant, timely and effective. I also manage some of our technology to make sure our advisors can effectively do their job. Like any leader, I make sure we are a well recognized pillar in the community by being involved in networking and charity work.

CHRISTINE'S FUN FACT

I love the show "Billions." There's a lot in the show that is highly unscrupulous and unethical (which is the complete opposite of how we run our firm). However, the tenacity and unwillingness to quit or lose is exciting.

Why did you choose this career?

I originally went to school for accounting because my father said I "was good at math." After some internships, I realized I didn't find accounting very exciting. I really enjoyed tax accounting though. Between knowing I wanted to make a difference for individuals and business owners, and my experience with tax accounting, the financial planning industry found me!

What did you do to prepare for this career?

In addition to my college accounting experience, I also needed to get licensed with the state of New Jersey by taking some tests. I followed that with designations and continue to learn and take exams to better myself!

What do you enjoy most about your job?

I love meeting with all kinds of people. The other day my client was tearing up on the phone when she realized she would be able to do all the things she wanted and support her family the way she wished. That was a great moment for me. There are lots of happy days when we help clients reach their financial goals! The best part of my job is the flexibility. I can design my day however I want!

What do you find most challenging about your job?

Being organized is very important. As an owner of a financial services firm, you can easily be pulled in so many directions. It's important to prioritize what needs to get done by when to make sure nothing is overlooked. Being very busy is very challenging, but it's a choice I make to reach my own career goals. I'm also a mom of 3 young children. Balancing work and making sure I'm a good parent is a struggle for all working moms. But I always try to be my best!

What is one piece of advice you would give to a young person who is interested in your profession?

Take a risk. There's never a better time to get into our industry (or any industry where you have no salary but uncapped income potential) than when you are young and don't have the responsibility of a mortgage, car payment, childcare costs and much more. If you have parents that are supportive of you taking such a risk, you can build a foundation in an amazing career so that when you do have all those blessings (children, travel, a spouse or something else) you can enjoy them and not worry about uncertainties. This career also provides renewal income for the future, so the business you build keeps paying you and is an asset to you!

