

# Betsy Cox

intellicents investment solutions, inc.

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April 2022

**This Brochure Supplement provides information about Betsy Cox that supplements the intellicents investment solutions inc. Brochure, a copy of which you should have received. Please contact our Director of Operations at 507-377-2919 if you did not receive intellicents investment solutions inc.'s Brochure or if you have any questions about the contents of this supplement. Additional information about Betsy Cox is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Item 2- Educational Background and Business Experience**

Betsy Cox born in 1983, received the following formal education after high school:

- 2005-2008 Metropolitan State University of Denver – B.S. Personal Finance
- 2003-2005 Arapahoe Community College

Business experience includes:

- February 2019 - Present – Financial Consultant for intellicents investment solutions, inc., Golden, CO
- Nov 2007 – Aug 2018 Junior Partner for Asset Solutions, Inc.

Professional examinations, certifications and/or designations include:

- Certified Financial Planner (“CFP® “)
- FINRA Securities examinations: Series 7 and Series 66
- Life, Accident & Health License

The CFP® designation is a financial planning credential awarded by the Certified Financial Planner Board of Standards, Inc. to individuals who satisfy its educational, work experience and ethics requirements. Recipients of the CFP® certification hold a bachelor’s degree (or higher) from an accredited college or university, have completed three years of full-time personal financial planning experience and successfully completed the CFP® Certification Exam. In order to maintain the designation, CFP® holders must satisfy ongoing requirements which include at least 30 hours of continuing education every two years.

## **Item 3- Disciplinary Information**

intellicents investment solutions inc. (“iis”) is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. iis has no information to disclose in relations to this item.

## **Item 4- Other Business Activities**

intellicents investment solutions inc. is part of a consortium of companies that focus on providing employee benefit services to employers. The services include investment advisory services provided through iis, and through its affiliated companies: life, disability and health insurance services, and benefits consulting services that range from defined contribution retirement Plans to employee wellness programs.

To provide brokerage and insurance services, Betsy Cox is a registered representative of Mutual Securities, Inc of California, doing business as Mutual Securities, a registered broker dealer and member of FINRA. She is a licensed agent of multiple insurance companies.

For services provided by the affiliated intellicents investment solutions companies, the companies and Betsy Cox may receive consulting fees and/or commissions on sales of any investment and insurance product sold to clients. iis may also provide investment advisory services to the clients of the affiliated intellicents investment solutions companies; however, iis never receives commissions on any assets under management for which iis receives advisory fees.

#### **Item 5- Additional Compensation**

Because of the nature and extent of the business intellicents investment solutions (iis and its affiliates) provides various custodians and mutual fund companies “revenue sharing” in the form of shareholder servicing fees, sub-transfer agency fees, 12b-1 fees and finders fees. These fees are fully disclosed to plan sponsors and participants and are passed on to the plan sponsor or the plan for use in offsetting plan related fees.

#### **Item 6 - Supervision**

Betsy Cox is one of several supervised persons who give general advice on behalf of intellicents investment solutions and under the direct supervision of Mr. Nicholas Holmes, Chief Compliance Officer. Inquiries about Betsy Cox should be forwarded to Mr. Nicholas Holmes at 800-880-4015.