



Ruthanne Fuller
Mayor

City of Newton, Massachusetts
Office of the Mayor

#100-23

Telephone
(617) 796-1100
Fax
(617) 796-1113
TDD/TTY
(617) 796-1089
Email
rfuller@newtonma.gov

March 13, 2022

Honorable City Council
Newton City Hall
1000 Commonwealth Avenue
Newton, MA 02459

To the Honorable City Councilors:

I am pleased to appoint James Cote of 934 Watertown Street, West Newton 02465 as a member of the Licensing Board. His term of office shall expire on June 3, 2024 and his appointment is subject to your confirmation. Mr. Cote will complete the remainder of Anil Jonathan Adyanthaya's unexpired term which ends on June 3, 2024. Please note, Mr. Cote will fill the vacancy which will need to be held by a Republican.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller
Mayor

RECEIVED
2022 MAR 13 PM 3:54
CITY CLERK
NEWTON, MA 02459

Application Form

Profile

James _____ R _____ Cote _____
 First Name Middle Initial Last Name

_____ _____
 Email Address

934 Watertown St _____
 Home Address Suite or Apt

West Newton _____ MA _____ 02465 _____
 City State Postal Code

What Ward do you live in?

Ward 3

_____ _____
 Primary Phone Alternate Phone

Concord Wealth Management _____ Financial Advisor _____
 Employer Job Title

Which Boards would you like to apply for?

Licensing Board: Submitted

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on a board or commission?

I'm a former 3 term City Councilor at Large and I would like to serve on the licensing board as a way of contributing to the community.

[Jim Cote LinkedIn Profile.pdf](#)

Upload a Resume

Contact

Top Skills

Executive Search
Executive Coaching
Recruiting

Honors-Awards

Navy Commendation Medal
Thomas Jefferson Award
Navy Achievement Medal

Jim Cote

Financial Advisor
Greater Boston Area

Summary

Well known, and often referenced Financial Advisory professional recently appearing in major media outlets to include: Boston Globe, Good Morning America, Channel 5 Boston, Channel 4 Boston, Bankers & Tradesman, all social media outlets!

PROFESSIONAL CLIENTS INCLUDE: Professional Families, Dentists, Doctors, Military Officers, Development Directors, CEO's, CFO's, CIO, Lawyers, etc

FAMILY PRACTICE CLIENTS: Through our epic EDGE seminar program I am a speaker and adviser to many hundreds of families in the community.

MEDIATOR in State of Massachusetts: Skills gained with 9 years of mediation experience in areas of Business Mediation, Student/Parent College Planning, Pre-Marital Assets mediation, and Divorce Assets mediation.

EXPERTISE IN:

- *High Net Worth Clients/Estate Planning Management
- *Executive Financial Planning and their families in job/career transition.
- *Professionals Pre-Marital Financial Counseling.
- *Family Holistic College Planning.

Address potential challenges with a good plan. My experiences with having 10 children, working with young military families for 20 years, serving the courts as pro-bono as a trained Court Mediator, coupled with my career experiences in financial services and financial recruiting brings a high level of value to your life planning!!

CAREER PLANNING NOTE: This LinkedIn account has been set up to allow those seeking my expertise in Career Search. My professional business profile is under James Cote. Executives

seeking to enhance their chances for a new position in this challenging economy should contact me for advice and the pathway to a new career. My contacts are priceless and I am offering this advice freely. My office locations in Newton and Waltham are the ideal meeting point for those seeking to optimize their career search. The challenges today are obvious for senior executives and I am but one more valued resource in your search plan.

Experience

Concord Wealth Management
Financial Advisor/Networking Advisor
April 2011 - Present
Greater Boston Area

Financial Advisor that specializes in the overall asset growth planning, and risk management. This holistic approach ensures that you and your family are protected from whatever life can bring!!!

With Concord Wealth Management since January 2014. Additionally, a licensed broker/instructor with the Foundation for Financial Education Institute. www.learnfei.com . Overall 20+ years of Financial Services experience.

PROVIDING THE FINANCIAL SOLUTIONS YOU NEED TO HELP REALIZE ALL OF LIFE'S POSSIBILITIES

1. IRA'S, Pension Plans, Life Insurance, 401K rollovers.
2. Educational workshops in the workplace.
3. Financial planning for individuals, couples, or families.
4. Risk Management to include: Life Insurance and Disability Income Protection Insurance

Concord Wealth Management offers clients a boutique-firm feel with big-firm service and support. We believe there's no single more important factor in life than the value of strong, personal relationships. That's why we're focused on delivering personal care and attention to each and every client.

We serve individuals, families and small businesses throughout the New England area guiding our clients to financial solutions for all of life's stages.

Cote, Pulitzer & Alvarez Inc.
Career Search Executive Transition Expert
January 2009 - Present

In this position I have established myself as a premier resource for the senior executive in transition. Known as a "networker" and more importantly a connector I can assist senior executives, in their career transition.

All are welcome to contact me for the variety of resources that I may be able to provide to your career search.

City of Newton
City Councilor at Large, Ward 3
November 2013 - Present
Newton, MA

City Councilor at Large, Ward 3, City of Newton, MA. Experiences gained throughout my career in financial services, financial services recruiting, and community service beginning with my service in the Marine Corps qualifies me to run for this position.

United States Department of Defense
Board Member of the Newton Selective Service Board
June 2004 - Present
Newton, MA

The Selective Service Bureau still exists and is in place should the USA need to reinstate the draft. The purpose of the local Board member is serve on the quasi-judicial body (Draft Board) that assists those citizens challenging their draft status to receive all of the guarantees of law.

Harvard Street Neighborhood Health Center
Member of the Board
2009 - Present

Our Mission

Harvard Street Neighborhood Health Center will serve as the primary health resource to our community, through the delivery of comprehensive patient-centered medical care.

Our Vision

We believe all people have the right to high quality, available, accessible healthcare. We will partner with our community to positively impact the general health of our patients.

Mediation Works, LLC
Mediator
October 2005 - Present
Greater Boston Area

Accomplished Mediator that works in the small business, small claims court and family dispute resolution field. Meet the full qualifications as required by the Commonwealth of Massachusetts.

Accounting Management Solutions
Director of Retained Search Recruiting Services
April 2006 - December 2008 (2 years 9 months)
Waltham, MA

My staff and I developed the premier recruiting model for Accounting Management Solutions. Assisting executive candidates in the professional search of new roles and matching them with perfect employment opportunities for their skill set. Additionally, we generated a large volume of temporary positions for our AMS temp staffers to fill. We were highly successful and profitable to such an extent that even though we purchased the recruiting group from AMS they were quick to re-enter the permanent recruiting business even though they said they would not!!!

Spherion Executive Recruiting
Managing Director
June 2000 - March 2006 (5 years 10 months)

Established the Worcester office of a major national employment GIANT. We successfully filled executive roles from Central Mass to Boston.

MetLife
Agency Manager of Insurance and Wealth Sales
September 1988 - July 1997 (8 years 11 months)

Agency Manager of a highly ranked MetLife sales and distribution office. Our office located with GE in the Berkshires specialized in family financial planning, pension planning, and small business wealth management. Expertise in life insurance, mutual funds, annuities, pension plans, business succession planning.

United States Marine Corps
First Sergeant
February 1975 - February 1995 (20 years 1 month)
25th Marines, Worcester, MA

First Sergeant in the premier fighting force in the world. Under my watch myself and the other 186000 Marines backed Ronald Reagan and Pope John Paul in their epic destruction of communism.

Education

University of Mary Washington

Master of Business Administration (M.B.A.), Business Administration and Management, General · (1985 - 1987)

Worcester State University

Bachelor of Applied Science (BASc), Business Administration and Management, General · (1981 - 1983)

Bishop Feehan Cote Family