



TTN-NYC Newsletter May 2016

TTN Member-Entrepreneurs

Beth Cartwright



Beth Cartwright, CRPC, LUTCF, a member of TTN-NYC's Program Committee, works for the MetLife as a financial services representative, but her status is very entrepreneurial.

"I function as a financial advisor," she explains, "specializing in several areas -- one being retirement, and the other special needs. I guide my clients to and through retirement as well as provide guidance for families with children and adults who need to be provided for on a long-term basis."

"The foundation of my practice focuses on understanding my clients' goals and concerns. Together we create a customized plan by addressing their insurance and investment needs." Functioning independently within the cloak of MetLife, Beth has her own client base and generates her own prospects.

"The luxury of what I do is that I can retire on Friday and be back to work on Monday', if I choose to." She eased into financial services as the result of a 2002 downsizing at the investment bank where she had been working.

"I knew I had an aptitude for strategizing," she recalls. It seemed like a seamless transition, but first she needed to acquire certain licenses to work in financial services. Beth continued her education by obtaining several professional designations -- namely, CRPC and LUTCF, along with various securities licenses.

Most of Beth's clients come to her by word-of-mouth referrals and workshops. She has developed relationships with several attorneys and accountants thereby providing a financial holistic approach for their mutual clients.

Ultimately, the key to her success, she notes, is the establishment of trust between herself and her clients.