



## JOHN B. COX, CFA, CAIA

**Chief Investment Officer, Member**

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John Cox is a Member of Warren Averett Asset Management and serves as Chief Investment Officer. John brings 20 years of experience, serving as a portfolio advisor with Kinsight, who merged with Warren Averett Asset Management in 2017. He also serves as Chair of the Firm's Investment Committee. He resides in Hoover with his wife and two children.

### Professional Affiliations/Recognitions

- CFA Society of Alabama
- 2020i RIA Investment Peer Group

### Community Involvement

- Riverchase United Methodist Church's Permanent Endowment Committee, Member
- University of Montevallo's Foundation Board and Investment Committee, Former Member
- Hoover Recreational Youth Basketball League, Former 4-Year League Director

### Ask Me About

- How to diversify around a low-basis concentrated stock position
- How to structure a fixed income portfolio in an environment of rising interest rates
- Taking my son to the National Championship game/Grand Canyon and getting stranded in Arizona for three extra days
- Serving on the University of Montevallo Foundation Board
- My love for animals, especially dogs (I have a Shih Tzu named "Cookie")

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OUR SUCCESS

### Designations and Certifications

Chartered Financial Analyst  
Chartered Alternative Investment Analyst

### Areas of Special Emphasis

[Private Client Services](#), [Family Office Services](#)

### Education

Bachelor of Business Administration, Finance  
University of Montevallo, Montevallo, AL

Master of Business Administration  
University of Alabama – Birmingham  
Birmingham, AL