



BOX **FINANCIAL** ADVISORS

Olga McKinzie

Account Manager

Olga joined Box Financial in December 2020 as an Account Manager. She specializes in establishing and managing client accounts to make timely account transfers and investment workflows.

On a day-to-day basis, she works diligently to ensure the accuracy of data flow processing between Box Financial clients and investment sources. During the tax season, she collaborates with investment sponsors and client accountants to facilitate the 990-T, UBIT, and other tax-related filings.

Olga's background as a former business owner has led her to have a deep understanding of the value of meaningful client connections and the issues facing businesses of all sizes. She has a passion for developing long-term client relationships and helping clients achieve their financial goals. If you call the main Box Financial line, you're likely to be greeted by Olga's cheerful voice. She is always happy to help and eager to find a swift solution.

She attended the University of Texas at Arlington, where she earned her B.S. in Business Administration/International Business. Through her studies there, she developed a love for organizational management and discovering solutions for complex challenges.

In 2010, Olga married Joseph, who is a loan officer in DFW area. They enjoy volunteering at local animal shelters and have four adopted pets. You can catch them working out at the gym with daily weight training or doing cardio-circuit workouts together. On the weekends, they take pleasure in spending time with family and cooking meals together.