



BOX
FINANCIAL
ADVISORS



Joby Raymond

Financial Advisor

Joby joined Box Financial Advisors in September 2023 and has brought with him several years of industry experience and knowledge. He completed his undergraduate education at Texas Tech University in 2002, where he received a Bachelor of Business Administration in Finance. In 2012, he received the CERTIFIED FINANCIAL PLANNER™ certification, known as the standard of excellence for financial planners. As a CFP® professional, Joby has completed the extensive training and experience requirements; and is fully committed to the CFP Board's ethical standards that require putting clients' interests first.

After graduating from Texas Tech, Joby relocated to the Dallas-Fort Worth metroplex, working in the sports industry for several years, before getting into the finance industry in 2008. After three years as a Financial Planner, Joby took a break in the industry and joined the family business, obtaining valuable experience in corporate finance and operations. His passion for financial planning led to a return to the industry in 2017, where as a Financial Analyst for Castleview Partners Joby was responsible for servicing a book of \$120 million in client assets. He later joined Castleview Partners – Corporate Office in 2021, assisting in areas of operations, compliance, technology, software development and system integrations.

Joby and his wife Shae live in Highland Village, TX along with their three sons, Dakota, Mikah, and Kory. In his free time, Joby enjoys coaching his sons' baseball teams and taking trips with his family. He and his wife love their community and are actively involved in their church.