



BOX
FINANCIAL
ADVISORS



T. Elliot Stone, CFP®

Wealth Advisor

Elliot joined Box Financial Advisors in August of 2022. He brings the skills and experience he gained as an Advisor at Morgan Stanley, where he collaborated for six years as a Financial Planner, Portfolio Manager, and Analyst on a team of eight that cared for roughly \$700 million in client assets. There, he served roughly 250 individuals, families, and businesses.

Before Morgan Stanley, Elliot was a Financial Analyst for Lithia Motors, Inc., after the completion of his B.S. in Financial Mathematics from Southern Oregon University, where he graduated Magna Cum Laude.

Elliot's connection to Box Financial came about in a miraculous way and represents a deep alignment of shared values and a mission to bring Heaven to the marketplace. To us, the factors around our initial conversations made it clear that God wants him here.

We admire how Elliot invites the Lord's guidance to bring profound financial peace and abundance to those he cares for. Elliot is driven for thoroughness and excellence, whether he is caring for clients' financial plans or reviewing our portfolios. At the same time, he has the skill set to simplify the complexities of investing and planning in a way that his clients leave each meeting feeling confident and empowered. In 2024, Elliot attained his CERTIFIED FINANCIAL PLANNER® designation, deepening his ability to care for the nuances of our clients' needs.

Elliot and his wife, Carolyn, were married in 2009 and grew up in the logging country of Eastern Washington and Northern Idaho. They have a wonderful son, Bruce, and are always on the hunt for good food, good music, and anything outdoors, especially if there's a body of water involved.

In addition to serving in their church as a worship leader, Elliot has a passion to support causes that fight human trafficking and strengthen families.

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