



Portfolios at Your Place

SEPTEMBER 2020

Thursday, September 17 - 9 AM: Why is That Fund/ETF in My Portfolio?

Every fund or ETF we hold in our clients' portfolios is more than just a line item on a statement. Join us as CEO/Chief Investment Officer Travis Upton interviews Portfolio Manager Alex Durbin. Alex will go through each of our five core objective-based strategies to talk about his favorite funds and the thesis for why we own those funds in our clients' portfolios.

Tuesday, September 29 - 4 PM: Heading Into the Last Quarter of the Year

It's hard to believe, but the end of September means we are heading into the 4th quarter and there are only three months to go in calendar year 2020. A lot has happened this year in markets and a lot may still happen with elections, vaccines, and economic stimulus likely to dominate headlines. Join us as Portfolio Manager Alex Durbin interviews CEO/Chief Investment Officer Travis Upton to talk about how we are positioning portfolios as we look to the final months of 2020.

To RSVP, email your name and which event you want to attend (or both!) to events@josephgroup.com or register online at josephgroup.com/events

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