

# PORTFOLIOS at Your Place

Tuesday  
January 25 @4PM



## PREDICTIONS ARE FOR SHOW; PORTFOLIO CHANGES ARE FOR DOUGH

This time of year, we love to quote the founder of the Leuthold Group, Steve Leuthold in saying “predictions are for show; portfolio changes are for dough.” At January’s Portfolios at Your Place, we will look at the key themes we are focused on in 2022. These aren’t predictions or forecasts, but instead are key areas of focus which lead to the scenarios which help us plan ahead for portfolios as we navigate the curve balls 2022 may throw at us. We would love for you to join us as we map out a game plan for the investing year ahead!

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### About Our Speakers



Partner, CEO and Chief Investment Officer Travis Upton provides visionary leadership to enhance The Joseph Group’s culture and mission through big ideas and impactful relationships. In his role as Chief Investment Officer, Travis chairs the firms’ investment committee and uses his communication skills to simplify investment concepts. Travis has over two decades of financial services experience and holds the Chartered Financial Analyst (CFA), Financial Risk Manager (FRM), and Chartered Alternative Investment Analyst (CAIA) designations. Travis and his wife Shannon live in Hilliard, are active members of Cypress Church, and have three children. He loves trying new foods and enjoying tranquility on Sunday afternoon hikes and kayak trips.

Portfolio Manager Alex always loved markets. He remembers leafing through the Columbus Dispatch Business Section in elementary school looking at stock tables. The concept of returns on capital when, to that point in his life, all his returns had been on labor, was fascinating to him.

He never really looked back. Alex received a BA in Finance from Cedarville University and was awarded a M.A. in Financial Economics from Ohio University. He worked for Edward Jones out of college, moved to Huntington Bank for several years, and most recently spent four years at the Ohio Schools Employee Retirement System where he managed OHSERS’ global equity portfolio. He lives in Johnstown with his wife, Cynthia, and sons Thomas and Dallas. He enjoys spending time with family, being outdoors, and reading history and theology.

