

# PORTFOLIOS at Your Place

Tuesday  
February 22 @4PM



## Looking Beyond the Pandemic: Opportunistic Themes for the 2020s

What might the world look like after COVID? Portfolio Manager Alex Durbin and Partner, CEO and Chief Investment Officer Travis Upton will discuss a range of themes including changes in the delivery of health care, supply and demand for energy, and innovations in technology that present opportunities for investors in the years ahead.

**RSVP to [events@josephgroup.com](mailto:events@josephgroup.com) or online at [josephgroup.com/events](https://josephgroup.com/events)**

### 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, sons Thomas and Dallas, and daughter Audrey. He enjoys spending time with family, being outdoors, and reading history and theology.

