

PORTFOLIOS at Your Place

Tuesday
May 24 @4PM



A Discussion About Alternative Investments with Aaron Filbeck, CAIA, CFA, CIPM, FDP

Aaron Filbeck started his career as an Investment Analyst and Portfolio Manager with The Joseph Group and is now Managing Director for the CAIA (Chartered Alternative Investment Analyst) Association, a global professional body dedicated to alternative investments, and sponsor for the CAIA charter.

Join us as Aaron returns to his roots and through an interview with Travis Upton, Partner, CEO and Chief Investment Officer, discusses the landscape of alternative investments from an academic and practitioner perspective. The discussion will focus on objective-based portfolios and how different alternative investments (outside of mainstream stocks and bonds) can be used as tools to further client objectives across different strategies. The combination of Aaron's intimate knowledge of TJG portfolio construction and his global thought leadership related to alternative investments make this a can't miss event!

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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.

As Managing Director of the CAIA Association, Aaron Filbeck, CAIA, CFA, CIPM, FDP, oversees content and product strategy for the Fundamentals of Alternative Investments (FAI) Certificate Program. Prior to this, Aaron was responsible for strategic direction of CAIA Association's content agenda, thought leadership, and member education initiatives, and supported content development for the CAIA Charter Program. His work has been published by Oxford University Press and The Journal of Investing, and he is a frequent speaker on alternative investing topics. His practitioner experience lies in private wealth management, where he served as portfolio manager, overseeing asset allocation and portfolio construction. He has a B.S. with distinction in Finance and a Master of Finance from Penn State University.

