

PORTFOLIOS at Your Place

Thursday
August 18 @4PM



Markets are changing fast. With war, inflation, corporate earnings, and a mid-term election coming up in November, there is plenty to talk about.

Join us via Zoom as Alex Durbin, Portfolio Manager, and Travis Upton, Partner, CEO and Chief Investment Officer, share thoughts on the markets and how we are positioning the objective-based portfolios we manage on behalf of our clients.

RSVP to events@josephgroup.com or online at josephgroup.com/events

About Our Speakers



Portfolio Manager Alex Durbin 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.

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.

