



BETA ALPHA Ψ

EXECUTIVE GRADUATE HONOR

March 9, 2021 8-9PM EST

**Not Stocks And Not Bonds: An Introduction and Current Overview of Opportunities
In The Alternative Investment Industry**

Speaker Information:



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Bio: Aaron Filbeck serves as Associate Director of Content Development at CAIA Association, where he supports the curation, development, and execution of the organization's content strategy and CAIA Charter Program curriculum. A demonstrated writer, Aaron has published on topics such as environmental, social and governance (ESG) investing, liquid alternatives, commodities, and asset pricing/factor investing. Most recently, he co-authored a paper, "Performance Assessment of Firms Following Sustainalytics ESG Principles," in The Journal of Investing. Prior to his role at CAIA Association, Aaron served as a portfolio manager at The Joseph Group Capital Management, a registered investment adviser (RIA) in Columbus, OH. Here, he oversaw manager research and portfolio

construction efforts for \$500 million worth of high net worth individuals and institutional retirement plans. Aaron earned a B.S. with distinction in Finance and a Master of Finance from Penn State University. He holds the Chartered Alternative Investment Analyst (CAIA), Chartered Financial Analyst (CFA), and Certificate in Investment Performance Measurement (CIPM) designations. He is Vice President of CFA Society Columbus and serves on multiple advisory boards for the Sam & Irene Black School of Business at Penn State Behrend. Follow Aaron at @Filbeck_A on Twitter.