

Josh Jakobovitz ready to serve Warburton Capital

written by warburton | April 19, 2022

Jonathan Hall, President of Warburton Capital, announced that Mr. Josh Jakobovitz has joined the firm as a Client Service Specialist.

Josh graduated from The University of Oklahoma with a Bachelor of Science degree in Economics and a Bachelor of Arts degree in Chinese Language and Culture. He is currently pursuing his Master of Business Administration degree at the University of Tulsa.

During his tenure at OU, Josh developed a passion for exploring and learning about global cultures which led to his acceptance of a full scholarship to live and study in Beijing, China, for a year following completion of his undergraduate studies. In China, he worked with young children to help them develop their English capabilities while furthering his mastery of Mandarin.

Prior to joining Warburton Capital, Josh worked for a Fortune 100 company focused on providing payroll services to some of our country's largest corporations. He also worked in the aerospace and higher education industries and led numerous international training initiatives for young pilots.

Josh is a strong advocate of lifelong learning and volunteers with the Mizel Jewish Community Day School, where he helps coordinate fundraising and local events, and with Zarrow Pointe and their residents to help connect them with distant family by assisting with new technology.

When he is not volunteering, Josh can be found hunched over a chess board with friends or outside playing disc golf with his family.

Serving as a Client Service Specialist with Warburton Capital, Josh is on our front-line of client contact. He responds to client requests, develops/implements solutions to improve operational efficiencies and assists in onboarding new clients.

Josh currently resides in Tulsa with his beautiful wife Madison and their Yorkie, Tipper.

Hall commented, “*Josh’s wealth of client facing experience, his commitment to excellence, and servants’ heart make him an ideal fit for Warburton. I’m confident Josh will be an excellent addition to our team. He will help increase our capacity to fulfill our firm’s mission of Helping People and providing White Glove Service! Please join me in welcoming Josh to our Team!*”

Founded in Tulsa in 2006, Warburton Capital Management provides a Family Office Experience to their clients. We advise business owners, professionals, corporate executives, individuals, families, retirees, endowments and foundations on a multitude of Wealth Management matters including Portfolio Management, Tax Planning, Estate Planning, Insurance Coverage, Charitable Intent and Trust Representative Services. The Firm offices in First Place Tower at 15 East Fifth Street, Suite 3675, Tulsa, Oklahoma, 74103.