JOHNSON
INVESTMENT COUNSEL

DIGITAL RESOURCES FOR ACCESSING FINANCIAL INFORMATION

In addition to ongoing personal communication, Johnson Investment Counsel provides clients a variety of digital resources for their wealth management needs. Clients can access these tools through our JIC website. The information below explains some of the benefits of each portal. Your Portfolio Manager can help you determine which tool best meets your needs.

What are the differences and benefits?

eMoney - eMoney is a state-of-the-art financial planning tool that allows us to collaborate with you as we work together to reach your goals. Its interactive, dynamic functionality allows for real-time planning and decision-making. Aggregating all of your asset and liability accounts on one secure site provides visibility into your entire financial picture on an ongoing basis. eMoney's industry leading client portal allows for the sharing of documents, along with a digital vault to make all of your important documents and financial information accessible on one secure site.

Charles Schwab - Charles Schwab is the primary custodian of assets managed by Johnson Investment Counsel. JIC clients with accounts held at Schwab can utilize this resource to view statements, see transactions, check balances, obtain tax documents, and more.

Addepar - Addepar is an investment management portal that provides in-depth portfolio analysis. This tool is ideal for clients looking for detailed investment information. Addepar displays data for accounts managed by Johnson Investment Counsel only.

Johnson Charitable Gift Fund - Access is available through our website for clients who make grants to charities through a JCGF Donor Advised Account.

Setting Up Accounts:

eMONEY:

JIC sends an email invitation for clients to establish their account and upload their financial information.

CHARLES SCHWAB:

JIC establishes a Schwab Alliance account for all clients. Schwab Alliance is the portion of the Charles Schwab website customized for clients. Clients will receive an email from Schwab with details for completing the process.

ADDEPAR:

For clients who wish to view investment analysis on Addepar, please reach out to your Portfolio Management team to provide access.

CHARITABLE GIFT FUND:

JIC will establish an account for clients who choose to facilitate charitable giving through JCGF.

If you have any questions or difficulty logging in, please contact a member of your Portfolio Management team. We are happy to help.

Where can I log in?

Visit our website, JOHNSONINV.COM, and in the upper right hand corner, choose "Client Login". You will see images like those below and can access your selected option.