

OUR MISSION

We provide financial peace of mind to our clients through trusted counsel, exemplary service, and a genuine heart to serve.

SIZE & SCOPE

est. 1965
59
years serving
clients

clients in

states

over
\$20B
in assets under
management


159
employees

OUR EXPERTS



Jason Jackman, CFA
Chief Executive Officer
Principal



Charles Rinehart, CFA, CAIA
Chief Investment Officer
Principal



Brandon Zureick, CFA
Managing Director &
Portfolio Manager
Principal



Tara Adams, CTFA
Vice President of Trust Services
Senior Trust Officer
Principal



Anthony (Tony) Kure, CFP®
Managing Director of
Northeastern Ohio Market
Senior Portfolio Manager
Principal



AREAS OF EXPERTISE

- Investment Management
- Wealth Management
- Estate Planning & Trust Services
- Retirement & Cash Flow Planning
- Tax Planning
- Family Office Services
- Charitable Planning
- Asset Protection & Insurance

WHAT DISTINGUISHES US?

- A client-first culture
- 100% employee-owned
- 100% independent
- 100% fee-only
- Fiduciary since our founding
- Full-service Trust Company
- In-house research analysts
- Experienced professional staff:
 - 36 CFA Charterholders (CFA)
 - 36 CERTIFIED FINANCIAL PLANNERS™ (CFP®)
 - 7 Licensed Attorneys
 - 8 Certified Trust and Financial Advisors (CTFA)
 - 2 Certified Public Accountants (CPA)

RANKINGS & RECOGNITIONS

- Barron's: #29 "America's Best 100 RIA Firms"¹
- Recognized by Forbes "America's Top 250 RIA Firms"²
- Financial Advisor Magazine: #31 "Nation's Largest RIAs"³
- Top Workplace 11 consecutive years⁴



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11 CONSECUTIVE YEARS

COMMUNITY IMPACT

We wholeheartedly believe that being an active member of the community is essential. Giving back is ingrained in our values and started nearly 60 years ago with our founder, Tim Johnson. This belief is instilled in our employees and has become part of our corporate culture. Of our employees, 80% volunteer across 193 organizations, serving on over 150 boards and advisory committees throughout the community.

72
BOARD
POSITIONS

85
COMMITTEE
POSITIONS

193
ORGANIZATIONS
SERVED

ABOUT JOHNSON

Johnson Investment Counsel is one of the nation's largest independent wealth management firms, managing more than \$20 billion in assets for clients in 50 states. Johnson Investment Counsel is an employee-owned firm, offering a full range of fee-only, integrated wealth management services, including: investment portfolios, education and retirement planning, cash management, estate planning, trust services, charitable giving, mutual funds, 401(k) plans, IRAs, and more. Johnson Investment Counsel has built strong, long-term relationships with individuals, families, charitable organizations, foundations, and corporations through four integrated divisions.

DISCLOSURES

¹Barron's: Barron's ranking as of June 30th, 2024 is based on assets managed by the firms and the revenue those assets generate, regulatory record, technology spending, staffing levels and diversity, succession planning and other metrics.

²Forbes: Johnson Investment Counsel ("JIC") is not affiliated with Forbes or SHOOK Research, LLC ("SHOOK") and has not received compensation from nor provided compensation to Forbes or SHOOK. This ranking should not be interpreted as an endorsement and no ranking or award implies any level of skill or training. Rankings may not be representative of any one client's experience as it reflects a sample of client experiences. Rankings are not indicative of future performance and there is no guarantee of future investment success. Forbes' list was compiled by SHOOK, which uses quantitative and qualitative data, including interviews, to rank member firms. SHOOK performs due diligence as the basis for its rankings. The Forbes ranking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due-diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. SHOOK seeks out nominations from the financial services industry. SHOOK accepts advisors who meet pre-determined minimum thresholds and acceptable compliance records. SHOOK received nearly 42,643 nominations based on thresholds. 23,100 of those nominees were invited to complete an online survey. SHOOK creates rankings of role models – firms that are leading the way in offering best practices and providing a high-quality experience for clients. A focus on both quantitative and qualitative factors, including telephone and in-person meetings, was imperative. For additional details on ranking methodology, please visit Methodology: America's Top RIA Firms 2023 (forbes.com).

³Financial Advisor: FA's RIA survey is a ranking based on assets under management at year end of independent RIA firms that file their own ADV with the SEC. FA's RIA ranking orders firms from largest to smallest, based on AUM reported by firms that voluntarily complete and submit FA's survey by the deadline. To be eligible for the ranking, firms must be independent registered investment advisors and file their own ADV statements with the SEC and provide financial planning and related services to individual clients. Firms must have at least \$500 million in assets under management as of December 31, 2023, to be included in the print edition of Financial Advisor magazine's 2023 RIA survey. Firms with under \$500 million will be included in the FA's expanded online RIA survey.

⁴Top workplace: The ranking is based on a survey of employees conducted over the period 2/5/2024 to 2/20/2024. The survey requests employees to anonymously rate the firm and provide feedback on their experience.

The above rankings may not be representative of any one client or employee's experience as it reflects a sample of experiences. The ranking is also not indicative of future performance and there is no guarantee of future investment success.