

Johnson Investment Counsel: Investing in the Future

Founded by Tim Johnson, then a finance professor at the University of Cincinnati, Johnson Investment Counsel (JIC) began as a humble effort to help friends and acquaintances navigate their financial challenges. From Simple beginnings, the firm has grown into one of the nation's largest registered investment advisors, managing nearly \$20 billion in assets for clients across all 50 states.

Despite this tremendous growth, the ethos that inspired its founder—offering genuine help to people—remains at the heart of the firm's mission: "To deliver peace of mind through trusted counsel, exemplary service, and a genuine heart to serve."

Johnson Investment Counsel has always understood that financial advising is about building close relationships grounded in trust. Clients have come to know the firm for its integrity, compassion, and wise counsel.

[Tim] Johnson believed that maintaining trust required independence, and in 2001, he made a pivotal decision by selling the firm to a group of key employees, making JIC 100% employee owned. Today, this ownership group has grown to 47 employees, all of whom are dedicated to the firm's mission.

Johnson Investment Counsel predominantly hires young professionals and develops them from within, instilling the firm's culture and values. Leadership development is facilitated through internal and external training, exposure to teams



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and projects, and opportunities for personal and professional growth.

The firm is managed by an Executive Team and Management Team, with representation from across the organization. Each major division has its own leadership team.

Their growth can be attributed to its commitment to client satisfaction. Client referrals have been the major source of growth since the firm's inception, allowing them to invest in their services, deepen expertise, and create opportunities for employees.

The firm also has a long history of giving back to the communities it serves. JIC encourages employees to volunteer and serve on boards, supporting 193 unique organizations with 72 employees in board positions and another 85 in committee or leadership roles.

As Johnson Investment Counsel continues to grow, it remains committed to its foundational values and its mission to deliver financial peace of mind to its clients. The firm's decentralized strategic planning process allows newer and emerging leaders to participate meaningfully in shaping the strategic direction of their departments and the organization.

With a focus on leadership development, client satisfaction, and community involvement, Johnson Investment Counsel is well-positioned to continue its legacy of trusted financial guidance for generations to come.

Johnson Investment Counsel

President: Jason Jackman

Website: johnsoninv.com

About: Johnson Investment Counsel, Inc. was founded in 1965 under the principle that clients are the top priority. Their dedication to service stems from a passion to provide sophisticated solutions to clients, partnering with them to develop long-lasting relationships that span generations. As a fee-only wealth management firm, Johnson Investment Counsel has steadily grown to become one of the nation's largest independent wealth management firms, currently serving clients in 49 states.



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