INTRODUCTION TO JOHNSON INVESTMENT COUNSEL

JOHNSON INVESTMENT COUNSEL

OUR MISSION

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

SIZE & SCOPE

since **1965** we have been serving clients

clients in


states

over **$23B** in assets under management

162 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

Chad R. Maggard, CFA
Managing Director,
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:
  39 CFA Charterholders (CFA)
  40 CERTIFIED FINANCIAL PLANNERS™ (CFP®)
  7 Licensed Attorneys
  8 Certified Trust and Financial Advisors (CTFA)
  2 Certified Public Accountants (CPA)

MEDIA@JOHNSONINV.COM | JOHNSONINV.COM

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 13 consecutive years[4]

TOP WORK PLACES 2026
Cincinnati.com | The Enquirer
PART OF THE USA TODAY NETWORK
13 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 in 1965 with our founder, Tim Johnson. This belief is instilled in our employees and has become part of our corporate culture. Our employees, volunteer across 171 organizations, throughout their communities

62	66	171
BOARD POSITIONS	COMMITTEE POSITIONS	ORGANIZATIONS SERVED

ABOUT JOHNSON

Johnson Investment Counsel is an independent wealth management firm managing more than $23 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.