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## **Johnson Investment Counsel Surpasses \$20 Billion in Assets Under Management**

*This milestone places the firm as one of the largest RIA's in Ohio and the nation*

**Cincinnati, Ohio (December 4, 2024)** – [Johnson Investment Counsel](#), an independent wealth management and advisory firm, is proud to announce it surpassed \$20 billion in assets under management (AUM). This milestone marks the firm's commitment to honest, objective and long-term focused financial counsel for clients.

"This accomplishment not only reflects our firm's current success, but more importantly, the partnerships we've built with our clients over the last six decades," said Johnson Investment Counsel CEO Jason Jackman. "Our clients trust us with their valuable financial assets – and we will continue to provide personalized services that make a meaningful impact on their long-term financial journey."

Johnson Investment Counsel has clients in 50 states and 158 employees with offices in Cincinnati, Cleveland, Dayton, Columbus and Detroit. The firm is 100% employee owned, an intentional decision made by Johnson Investment Counsel Founder Tim Johnson in 2001. In total, the company supports nearly 200 community organizations through employee volunteerism, such as nonprofit board positions and leadership roles.

Since the firm's creation in 1965, Johnson Investment Counsel has expanded its services from wealth management to include asset management, trust services, family office services and a charitable gift fund.

The firm is consistently recognized within the industry and the Cincinnati community, regularly ranking on Barron's and Forbes lists of top RIA firms and being named one of ten honorees at the University of Cincinnati Goering Center's 25th Annual Family & Private Business Award Event. It is also ranked third in the 2024 Cincinnati Business Courier's [Largest Greater Cincinnati Money Management Firms](#).

Johnson Investment Counsel will continue to maintain the highest standard of client service and commitment to excellence for current and potential clients. Learn more on its [website](#).

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**About Johnson Investment Counsel**

Johnson Investment Counsel is one of the nation's largest independent wealth management firms, managing over \$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 management, 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: Johnson Wealth Management, Johnson Asset Management, Johnson Trust Company and Johnson Family Office Services. The company has two offices in Cincinnati with additional offices in Dayton, Columbus, Cleveland-Akron, and Metro Detroit.

### ***Barron's Top RIA Disclosure***

*Advisors who wish to be ranked fill out a 102-question survey about their firm. Data is collected as of 6/30/2024. Barron's verifies the data against regulatory databases then applies their own rankings formula to generate a ranking. The formula features three major categories of calculations: (1) Assets, (2) Revenue, and (3) Quality of Practice. Each category contains multiple subcalculations. Barron's ranking is based on a variety of quantitative and qualitative factors. Quantitative factors include, but are not limited to, amount of assets, type of assets, growth, and client retention. Qualitative factors include, but are not limited to, experience levels, advanced degrees, industry designations, the size, shape and diversity of teams, charitable and philanthropic work and the compliance records of the firm and its associated employees. The ranking may not be representative of any one client's experience as it reflects a sample of client experiences. The award is also not indicative of future performance and there is no guarantee of future investment success.*

### ***Forbes Top RIA Disclosure***

*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. The ranking may not be representative of any one client's experience as it reflects a sample of client experiences. The award is 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 46,212 nominations based on thresholds. 25,103 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 the ranking methodology, please visit Methodology: America's Top RIA Firms 2024 (forbes.com): <https://www.forbes.com/sites/rjshook/2024/10/08/methodology-america-s-top-ria-firms-2024/?ss=topadvisorshook>*

***Cincinnati Business Courier Largest Money Manager List Disclosure***

*The ranking may not be representative of any one client's experience as it reflects a sample of client experiences. The award is also not indicative of future performance and there is no guarantee of future investment success. The ranking is based on assets under management as of 5/1/24 reported by individual firms via an online survey.*