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Johnson Investment Counsel Managing Director Recognized as 2024 Rising Star

Brandon Zureick joins the prestigious InvestmentNews list.

Cincinnati, Ohio (November 21, 2024) – <u>Johnson Investment Counsel</u>'s Managing Director and Portfolio Manager, Brandon Zureick, has been recognized as an *InvestmentNews* 2024 <u>Rising Star</u>. *InvestmentNews* selects winners that represent the next generation of leaders in wealth management based on industry accolades, contributions to the financial sector and personal community impact.

Zureick is a leader within the firm's Asset Management division. In this role, he directs a team responsible for day-to-day implementation across hundreds of institutional client accounts and four institutional class bond funds.

Over the past 12 months, Zureick has spearheaded several key initiatives and fostered significant business innovations for the firm. He led the firm's mutual fund reorganization, launched its Core Plus mutual fund and played a key role in its first Key Accounts initiative.

"I can't think of anyone more deserving of this recognition than Brandon," said Johnson Investment Counsel CEO Jason Jackman. "During his 13 years at the firm, he has significantly contributed to our growth and fostered meaningful client relationships. One of his biggest milestones was becoming a shareholder of our firm at the age 33."

Zureick is deeply committed to giving back to the community. For nearly a decade, he's been a member of the University of Cincinnati Managed Fund investment committee. He also served on the Young Professionals Board for the UC Economics Center and oversaw the expansion of the center's "Student Enterprise Program," which aimed to bring financial literacy to children in underserved populations. In addition, Zureick is closely involved with the Children's Tumor Foundation, Cincinnati Children's Hospital and the Cincinnati Ballet.

"This award is about more than personal achievement – it's about shining a light on the meaningful work we do at Johnson Investment Counsel," said Zureick. "I'm grateful to be part of an organization that values industry and community involvement. Each step along the way has deepened my commitment to serving clients with excellence and giving back to the community."

To learn more about Zureick's recognition, read the full *InvestmentNews* feature.

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About Johnson Investment Counsel

Johnson Investment Counsel is one of the nation's largest independent wealth management firms, managing \$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: 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.

Starting in July 2024, InvestmentNews invited financial advice and wealth-management professionals across the country to nominate their most exceptional young talent for the inaugural Rising Stars list. Nominees had to be aged 40 or under (as of November 30, 2024) and be committed to a career in wealth-management with a clear passion for the industry. Nominees were asked about their current role, key achievements and career goals, as well as the contributions they've made to shaping the industry. Recommendations from managers and senior industry professionals were also considered. The Rising Stars were determined by an independent panel of industry leaders. The receipt of this award had no associated compensation and was solely based on the metrics described.