

## About Us

**Founded in 2001, Ironwood Investment Counsel is a fee-only advisor dedicated to helping clients meet their unique financial objectives. The firm manages over \$1 billion for individuals, families, foundations, trusts and retirement plans.**

### Introduction

Ironwood Investment Counsel is a privately owned Registered Investment Advisor (RIA) located in Scottsdale, Arizona. The firm is dedicated to helping individuals and institutions build consistent and coordinated portfolios that address their unique financial objectives.

[Learn More →](#)

### Services

We are dedicated to helping our clients preserve and grow their wealth through a comprehensive advisory approach that integrates tax efficient investment management, cash flow needs, estate planning, charitable intentions, and more.

[Wealth →](#)

[Investment →](#)



Philosophy



Process



Advantage

We are an independent and objective firm dedicated to client service and the values of integrity, stewardship and discipline.

Ironwood Investment Counsel takes a comprehensive, client-centric approach to investment and wealth management.

We are a technical team of professionals striving to continually improve our knowledge in investments and wealth management.



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## Certifications and Qualifications

**Our team is dedicated to providing the highest level of service in order to create an exceptional client experience.**

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Our employees have a very diverse background with many years of experience and education, including master's degrees in portfolio management, taxation, and business administration.

**Please Note: Limitations:** The achievement of any designation or certification, should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Ironwood is engaged, or continues to be engaged, to provide investment advisory services.

Additionally, several of our investment team members have achieved the following designations:

Chartered Financial Analyst (CFA)  
Certified Financial Planner (CFP®)  
Certified Public Accountant (CPA)  
Certified Trust and Financial Advisor (CTFA)  
Certified Investment Management Analyst (CIMA®)

## Our Team

- + Our Partners
- + Portfolio Managers
- + Professional Staff

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## Commentary

**Economic and market overview made available to you every quarter.**

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1Q19  
Commentary

Click on the above image to view the quarterly commentary.



4Q18  
Commentary

Click on the above image to view the quarterly commentary.



3Q18  
Commentary

Click on the above image to view the quarterly commentary.



2Q18  
Commentary

Click on the above image to view the quarterly commentary.

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