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**A Colorado-based independent registered investment advisory firm  
working with clients nationwide to protect and grow their wealth.**

**DEEP EXPERIENCE &  
THOUGHTFUL APPROACH**

Our team specializes in sophisticated, customized estate  
planning and portfolio management for closely held

## Our Customized Approach

### IDENTIFY GOALS

Johnston & Associates, Inc. offers sophisticated wealth management solutions. Whether we're evaluating an individual investment, understanding a client's goals, or strategizing about a specific estate plan, we will thoroughly understand each situation.

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### EXECUTE

Our customized portfolio management meets the objectives of each client individually. We don't subscribe to a one-size-fits-all model portfolio. Each client's unique goals and objectives are balanced within the context of the overall long-term investment climate.

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### MONITOR

Our approach does not end with a single plan or prescribed asset allocation. We extend our relationships with our clients beyond the initial recommendations. We maintain and monitor the client's evolving situation offering updates and adjustments where appropriate and needed.

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## Our Services

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### PORTFOLIO MANAGEMENT

Our focus is identifying each client's unique ability and desire to accept risk in an investment portfolio. We design customized asset allocations and construct diversified portfolios enabling clients to meet their objectives.

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### PORTFOLIO CONSULTATION

We offer our clients a portfolio consultation service which is highly customized and uniquely individualized in its approach. This unique service allows clients to work with Johnston & Associates, Inc. on a consultative basis.

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### ESTATE PLANNING

We have over 35 years of experience developing sophisticated estate plans that strive to minimize both income and estate tax exposure. In addition, the importance of flexible and practical document design is never overlooked.

[LEARN MORE](#)

## READY TO MEET YOUR FINANCIAL GOALS?

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The experts at Johnston & Associates can help you stay informed and be aware of what's important. Contact us or sign up for our newsletter today.

[CONTACT US](#)

[SIGN UP](#)

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EXPLORE

- > Home

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- > Our Team

---

- > Our Services

---

- > Our Approach

---

- > Newsletter

---

- > Contact

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- > Disclaimer & Disclosure

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- > Privacy Notice

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- > ADV

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