



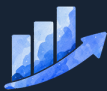
Chicory Wealth

Integrating Money & Meaning.

Comprehensive financial planning and ethical investing for those who care deeply about how their money impacts people, communities, and our planet.



Who We Work With



Wealth Builders

Long-term, comprehensive financial planning, built to grow and evolve throughout your life's journey.



Inheritors

Guidance that reflects your values and ensures your inheritance grows, protects, and provides for generations.



Retirees

Financial planning optimized for longevity, and for supporting the lifestyle you've been working toward.



Small Businesses

Comprehensive planning that navigates the complexities of wealth both inside and outside your business.



Nonprofits

Cash flow optimization, budgeting, and investment guidance that reflects your organization's mission and values.

Our Services

Financial Planning

We'll help you design a comprehensive financial plan, tailored to your specific needs, goals, lifestyle, and values.

Impact Investing

Investment guidance at Chicory prioritizes both *profit and purpose*. Our **Chicory Sustainable Core** portfolio invests in companies rigorously screened for ethical environmental, social, and governance practices. [Learn More.](#)

Full-Service Tax Planning

Chicory's experienced tax team helps ensure your tax strategy and financial plan are thoughtfully integrated, overseeing a wide range of complex tax matters for individuals, families, estates, businesses, and nonprofits.

Estate Planning

We take the burden of estate planning coordination off of your shoulders, managing key estate documents alongside trusted attorneys.

Shareholder Activism

Use your **shareholder voice** to advance the issues you care about. Beyond voting your proxies, we'll connect you with opportunities to file shareholder proposals, join investor campaigns, and learn from grassroots leaders driving change.

Get in Touch



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