Chicory Wealth

Financial Planning for Small Businesses

Chicory can help you navigate the complexities of wealth both inside *and* outside your business.



Each business is unique, and every stage of ownership brings new opportunities and challenges. Chicory will work as your trusted partner through it all, helping you make informed decisions about growth, operations, profitability, and long-term sustainability.

Business Planning

Depending on your specific needs, we'll focus on the areas below that are most relevant to you:



Build

A Strong Foundation

- Strategic goal planning
- Cash flow & liquidity management
- Profitability & cost structure
- Entity structure (LLC, S-Corp, C-Corp, etc.)
- Tax planning & optimization



Protect

What You've Built

- Risk management & protection
- Business insurance review
- Business continuity & disaster planning
- Contract & counterparty review
- Internal controls and oversight



Grow

With Confidence

- Pricing strategy & fee sustainability
- Margin analysis by product or service line
- Financial reporting & KPI dashboards
- Board or advisory structure design
- Internal controls & oversight



Transition

With Peace & Clarity

- Valuation and value-driver analysis
- Tax-efficient exit strategies
- Buy-sell agreements
- Internal succession vs. external sale
- Timeline & exit readiness

Heart-Centered Strategy

Your business should support the life you want to live, not consume it. We help you make decisions with intention, keeping your values, priorities, and long-term vision at the center.



Personal balance sheet exposure



Concentrated wealth risk



Estate and legacy considerations



Philanthropic or impact goals



"Operator" to "capital" income transition

Business Planning is offered as a standalone service. For owners and their families who wish to engage our full-service Financial Life Planning, Chicory's integrated advisory, investment, tax, and estate teams will create a unified strategy that supports both your business growth *and* your long-term personal financial goals. Reach out to us to learn more!

404-294-5917

INFO@CHICORYWEALTH.COM

WWW.CHICORYWEALTH.COM

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