Chicory Wealth

Advisor Solutions

Think of Chicory as your **fractional impact investing team –** a full-service, socially responsible solution for your most values-driven clients.



Through Chicory Advisor Solutions, your clients can invest in our proprietary **Sustainable Core Portfolio**, built to balance strong financial performance with meaningful, measurable impact. We invest in a diverse range of industries working on today's most pressing social and environmental challenges, using rigorous financial and ethical screening processes that are informed by our most impacted communities.

How it Works:

Full Service Management

Chicory's experienced investment team manages the trading, investment management, and impact analysis.

Custodian Agnostic

The Chicory Sustainable Core investment model can be implemented through whatever custodian you use.

In-Depth Reporting

We deliver in-depth quarterly reports and impact methodologies so you can answer client questions with confidence.

How Your Clients Benefit

For clients who care deeply about the impact of their investments, traditional options like ESG ETFs and mutual funds often fall short. They can feel distant, opaque, and limited in their impact.

Here's how our Sustainable Core Portfolio makes a difference:

- Greater visibility into what they are invested in and how those investments make an impact.
- A portfolio that addresses the intersectionality of social and environmental impact.
- More flexibility, higher tax-efficiency, and lower fees than traditional ETFs, mutual funds, and SMAs.
- Deeper trust with you, their advisor.

Our Portfolio & Impact

To learn more about how we screen our investments, check out our **Investment Methodology** overview. To learn more about Chicory's shareholder engagement, read our **2025 Impact Report**.



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