



Frequently Asked Questions (or how to navigate a virtual office)

What is Chicory Wealth's mailing address?

3904 North Druid Hills Road #366, Decatur, GA 30033

This address is a business mailbox located at a [UPS Store](#) in Decatur, Georgia, and we check mail daily. We can accept letters, packages and overnight mail at this address. Although our mailbox is secure, remember – NEVER send us the originals of any document. You may include a specific team member's name on the mailing, but please always use Chicory Wealth in your address as well.

What is your office phone number?

Our main office number is 404.294.5917. You can reach all our team members there.

What if I prefer to drop something off rather than send it through the mail?

Unfortunately, it's not possible to drop items off for us – we must receive them through the mail.

Is it possible for me to mail checks to you to deposit for me?

We are not able to receive checks and deposit them for you. This is for security reasons. If you want to mail in your deposit, please mail it to Fidelity. See details on how to do this in the next question.

What's the process for mailing checks for deposit?

To mail your checks for deposit, please mail them directly to Fidelity Investments. Checks should be made payable to "Fidelity Investments," and for retirement accounts it should be made out to "Fidelity Investments FBO [Client's Name]." Be sure to include the number of the account where the check should be deposited, either on the memo line of the check or in a note accompanying the check.

Regular Mailing Address:

Fidelity Investments
PO Box 770002
Cincinnati, OH 45277-0074

Overnight Mailing Address:

Fidelity Investments
100 Crosby Parkway, Mailzone KC1H
Covington, KY 41015

Is there an alternative to mailing checks for deposit?

Yes. Checks can also be deposited by using Fidelity Investment's mobile app on your smart phone. For a helpful instructional video that shows you how this works, click [HERE](#).

What if I need help with the technology required?

We are here to help you with virtual meetings, uploading documents to the Client Portal, accessing the Fidelity Investments app to deposit checks, and more.

- For help with virtual meetings, or if you're not sure who to contact, contact Tina Tyson
- For help with the Client Portal or uploading documents, contact Dan Kirslis
- For help with depositing checks, contact Paul Grabhorn

All these team members can be reached through our general phone number (404.294.5917) or email address: info@chicorywealth.com

Where can I get my documents scanned and papers shredded, or find a notary?

The [UPS Store](#) at 3904 North Druid Hills Road in Decatur provides many convenient services, although there is a fee for these services:

- [Scanning and Faxing Services](#)
- [Shredding Services](#)
- [Notary Services](#)
- [Copies](#)
- [Passport Photos](#)
- [Shipping and other usual UPS services](#)

I miss in-person gatherings! Will we ever get to see you?

We miss this too, and the answer is YES! We hold occasional in-person events, as well as online events. Events are announced in our monthly newsletter and on our [Chicory Wealth Webinars and Events](#) page.

What about the chocolate?

We know, right??? Chicory Wealth always provided the best chocolates when we were meeting in person, and we miss that too. We encourage everyone to BYOC for client meetings. And at our in-person gatherings, we will definitely have chocolate!