



Chicory Wealth
Advisor Solutions

Integrate money and meaning through the Chicory Sustainable Core Portfolio

Grant your clients access to Chicory's diversified portfolio of companies across various industries that are tackling the world's most critical social and environmental crises.



Individual Stock Portfolio

Take advantage of flexible investments, tax efficiency, and lower fees* when you invest in Chicory's diversified portfolio of individual stocks.

*Compared to SMAs, Mutual Funds, and ETFs



Rigorous Ethical Screening

Feel good knowing all companies in our portfolio are screened for corporate involvement and overall impact on: Climate, Human Rights, Social Justice, and Public Health.



Flexible Solutions

Simply add our portfolio to your existing marketplace, or leverage our full-service offering and leave the trading and investment management to us.



Custodian Agnostic

Implement Chicory's model portfolio through whatever custodian you already use - *it's that easy!*



Stay Informed

Answer client questions with confidence using our in-depth quarterly reports and regularly reviewed screening methodology overview.

Join the Waitlist

Sign up to learn more about Chicory Advisor Solutions and be the first to know when the service is available!
www.chicorywealth.com/advisor-solutions



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