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FOR IMMEDIATE RELEASE:

## **Wallick Investments, LLC awarded 4-star Morningstar Rating™**

Columbia, SC, December 8, 2014 - Wallick Investments, SC-based RIA firm, is proud to announce Morningstar®, a leading provider of independent investment research in North America, Europe, Australia, and Asia ([www.corporate.morningstar.com](http://www.corporate.morningstar.com)), has awarded Wallick Investments Core Growth Composite Separate Account a 4-star Morningstar Rating for 3-year, 5-year and overall performance among mid-cap core/blend managers for third quarter 2014. Wallick Investments is one of only three Registered Investment Advisory firms in South Carolina to receive Morningstar Separate Account Ratings™.

Wallick Investments' Core Growth, the major part of the Wallick Investments' equity allocation strategy, continues to outperform the Russell 3000. Wallick Investments Core Growth 3-year performance is 93.07% versus 85.18% (Russell 3000). Wallick Investments Core Growth 5-year performance is 128.00% versus 97.32% (Russell 3000). (See Portfolio Review at <http://www.publish-it-online.com/publication/?m=13445&l=1>).

In addition to Morningstar® ranking, Wallick Investments Core Growth Separate Account achieved prestigious 4- and 3-Star status from PSN Top Guns in the All Cap Core Equity Universe. 3 Star Top Guns are the top 10 returns for the 3-year period ending September 30, 2014. To become 4 star Top Guns, a product must have an R-Square of 0.8 or more relative to the style benchmark and returns for the three rolling 3-year periods better than benchmark. The Top 10 then become 4 star Top Guns. Wallick Investments Core Growth ranked #8 in the 4-Star category out of 97 firms and 130 products, and #10 in the 3-Star category out of 97 firms and 130 products. [www.informais.com](http://www.informais.com)

Since 2005, Wallick Investments reduces overall fees by offering separate accounts directly to investors. Wallick Investments accepts fiduciary responsibility for their clients' investment accounts ([www.wallickinvestments.com/images/Fiduciary.pdf](http://www.wallickinvestments.com/images/Fiduciary.pdf)) and upholds the CFA Institutes' Code of Ethics and Standards of Professional Conduct (<https://www.cfainstitute.org/pages/index.aspx>). Wallick Investments' strategies are available to individuals and trust accounts (IRA, joint or individual), pensions (401K), foundations, endowments and other non-affiliated advisors (50K minimum). More information is available at [www.wallickinvestments.com](http://www.wallickinvestments.com) or by contacting Daniel Wallick at 803-699-9400 or [Danwallick@wallickinvestments.com](mailto:Danwallick@wallickinvestments.com).