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For immediate release:

Highest Morningstar Rating Continues for WI Fidelis 10-year and Overall risk-adjusted performance

Columbia, SC— August 5, 2022: Wallick Investments, LLC’s separately managed account composite, WI Fidelis, received a 5-Star Morningstar Rating™ for 10-year risk-adjusted performance among 110 Mid-Cap Blend products, and a 5-Star Morningstar Rating™ for 3-year and Overall risk-adjusted performance among 149 Mid-Cap Blend products, all as of June 30, 2022. Only the top 10% of products in each product category receive 5 stars.*

Based on Morningstar’s 10-year Sharpe Ratio (return per unit of risk), WI Fidelis was #2 in the nation among Mid-Cap Blend managers reporting as of 2Q2022. WI Fidelis also received a 4-Star Morningstar Rating™ for 5-year risk-adjusted performance among 142 Mid-Cap Blend products as of June 30, 2022. This makes the 26th out of 31 quarters that WI Fidelis has received 4 or more Overall stars from Morningstar. 100% of the time, WI Fidelis has received a rating of 3 Stars or greater. (www.WallickInvestments/quarterly) Morningstar® is a leading provider of independent investment research (corporate.morningstar.com).

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