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FOR IMMEDIATE RELEASE:



Wallick Investments welcomes Lisa Breese, Community Relations Coordinator

Columbia, SC • March 17, 2023 – South Carolina-based RIA firm Wallick Investments, LLC is proud to announce that Mrs. Lisa Breese, with vast career experience in marketing, accounting, leadership, and community services, has joined our firm as Community Relations Coordinator. In addition to team support, her primary focus is sharing Wallick Investments’ unique approach of faith- and factor-based investing.

A graduate of the University of South Carolina, she began her career at SCANA in marketing for Charleston and Columbia. During her tenure, she represented SCANA at Home Shows, Career Fairs, participated in the Speakers Bureau and worked with residential, commercial and industrial customers.

After 15 years at SCANA, and dedicated time raising her family, Mrs. Breese returned to the workforce as an Accounting Specialist III at SC Farm Bureau. From there, she served as Coordinator of healthcare training for physicians and nurses at Palmetto Health in the Simulation Center— formation which led Mrs. Breese to a career at the USC School of Medicine as a Continuing Medical Education Coordinator. She was promoted within the hospital to Manager of Volunteer Services where onboarding, training and working with hospital volunteers of all ages became a passion. At the same time, Mrs. Breese managed two gift shops at Prisma Health Richland Hospital and Prisma Health Children’s Hospital.

After the pandemic, Mrs. Breese began working as the Operations Manager of the Greater Cayce West Columbia Chamber of Commerce and Visitor Programs where she enjoyed promoting the local municipalities and businesses, as well as creating events and working with the Chamber members. This position was especially rewarding as generations of her family have resided in these cities. Her favorite hobby is enjoying time with her husband, children and grandchildren.

Established in 2005, Wallick Investments, a registered investment advisory firm specializing in strategic moral investing, offers both investment advisory and portfolio management services. WI’s strategies and resources are available to individuals, institutions and other non-affiliated advisors, either through a direct client relationship with Wallick Investments, or through the Inspire Fidelis ETF (NYSE: FDLS) with a mandate of replicating the holdings in the WI Fidelis Multi-Cap Multi-Factor Index. For prospectus, please visit [Inspireetf.com/fdls](https://inspireetf.com/fdls). Read carefully before investing. For more information, call 803-699-9400, e-mail info@wallickinvestments.com or visit wallickinvestments.com and wifidelisindex.com.

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