For immediate release:

Wade Stinnette, Dan Wallick, Susan Wallick & Jake Wallick

Wallick Investments' Fidelis Composite receives Morningstar's highest rating for risk-adjusted performance

Columbia, SC, August 3, 2018 - Wallick Investments, LLC's Fidelis Composite received a 5-star Morningstar Rating™ among 403 large-cap value products as of June 30, 2018 for 3-year, 5-year and Overall risk-adjusted performance— Morningstar's highest rating.

WI Fidelis history:

- 4-star or greater Overall Morningstar Rating— 7th straight quarter out of 15 quarters
- 4-star or greater Overall Morningstar Rating— 10 out of 15 quarters
- 3-star or greater Overall Morningstar Rating— 100% of reporting quarters

Wallick Investments' chief equity composite strategy, WI Core Growth, received a 4-star Morningstar Rating among 115 mid-cap blend products as of June 30, 2018 for 5-year, 10-year and Overall risk-adjusted performance, and a 5-star Morningstar Rating for 3-year risk-adjusted performance.

WI Core Growth history:

- 4-star or greater Overall Morningstar Rating— 18 out of 25 quarters
- 3-star or greater Overall Morningstar Rating— 100% of reporting quarters

The Morningstar Rating for funds, or "star rating", is calculated for separate accounts with at least a three-year history. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics.*

Since 2005, South Carolina RIA firm Wallick Investments offers both investment advisory and portfolio management services, eliminating unnecessary fees for clients. As a CFA Institute member, Wallick Investments accepts fiduciary responsibility for their clients' accounts, with strategies available to individuals, institutions and other non-affiliated advisors. For more information on the above and all Wallick Investments' strategies, contact Wallick Investments at 803-699-9400 or visit our recently re-designed website, wallickinvestments.com.