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For immediate release:

## Highest Morningstar Rating for WI Fidelis 10-year risk-adjusted performance

Columbia, SC—May 18, 2022: Wallick Investments, LLC's separately managed account composite, WI Fidelis, received a 5-Star Morningstar Rating™ for 10-year risk-adjusted performance among 112 Mid-Cap Blend products as of March 31, 2022. Only the top 10% of products in each product category receive 5 stars.† Based on a 10-year Sharpe Ratio (return per unit of risk/standard deviation), WI Fidelis was #2 in the nation out of Mid-Cap Blend managers as of 1Q2022. WI Fidelis also received: a 5-Star Morningstar Rating™ for Overall risk-adjusted performance and a 4-Star Morningstar Rating™ for 3-year risk-adjusted performance, both among 155 Mid-Cap Blend products; and a 4-Star Morningstar Rating™ for 5-year risk-adjusted performance among 142 Mid-Cap Blend products, all as of March 31, 2022. This makes the 25<sup>th</sup> out of 30 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. Morningstar® is a leading provider of independent investment research (corporate.morningstar.com).

"WI Fidelis' 10-year 'track record' affirms our stock-selection processes effectively integrate faith-based values and factor-based investment science." –Daniel Wallick, managing partner and chief investment officer

Since 2005, Wallick Investments, a registered investment advisory firm specializing in Strategic Moral Investing, offers both investment advisory and portfolio management services, eliminating overlapping fees for clients. Wallick Investments' strategies and resources are available to individuals, institutions and other non-affiliated advisors. For more information call 803-699-9400, e-mail [info@wallickinvestments.com](mailto:info@wallickinvestments.com) or visit [wallickinvestments.com](http://wallickinvestments.com).

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