



Jake Wallick, Susan Wallick, Dan Wallick & Wade Stinnette

For immediate release:

## Highest Morningstar Rating for Wallick Investments Fidelis’ 3-, 5-, 10-year and Overall risk-adjusted performance

Columbia, SC— November 15, 2022: Wallick Investments, LLC’s separately managed account composite, WI Fidelis, received a 5-Star Morningstar Rating™ for 3-, 5-, 10-year and Overall risk-adjusted performance as of September 30, 2022 (see chart). Only the top 10% of products in each product category receive 5 stars.†

Time Period	Total Return* %	Morningstar Rating™
3-year	8.25	★★★★★ <sup>1</sup>
5-year	8.57	★★★★★ <sup>2</sup>
10-year	12.10	★★★★★ <sup>3</sup>
Overall	11.10	★★★★★ <sup>4</sup>

1) Out of 148 Mid-cap blend products as of 9-30-22

2) Out of 141 Mid-cap blend products as of 9-30-22

\*Annualized

3) Out of 109 Mid-cap blend products as of 9-30-22

4) Out of 148 Mid-cap blend products as of 9-30-22

84% of quarters WI Fidelis has received 4 or more Overall stars from Morningstar (27/32qtrs). 100% of quarters 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).

WI Fidelis composite factor-based methodology is the foundation for the WI Fidelis multi-cap multi-factor Index (solactive.com), and the Inspire Fidelis multi-cap ETF, with a mandate to replicate the WI Fidelis Index, is on the NYSE, ticker FDLS.\*\*

Since 2005, Wallick Investments, a registered investment advisory firm specializing in Strategic Moral Investing, offers both investment advisory and portfolio management services, potentially 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 or visit wallickinvestments.com and wifidelisindex.com.

† © 2022 Morningstar, Inc. All rights reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete, or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results. 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.

\*\* For prospectus, please visit: Inspireetf.com/fdls. Read carefully before investing.