



Wade Stinnette, Dan Wallick, Susan Wallick & Jake Wallick

FOR IMMEDIATE RELEASE:

WI Fidelis 4-star Morningstar Rating Continues

Columbia, SC — November 18, 2020: Wallick Investments, LLC's Fidelis composite received a 4-star Morningstar Rating™ among 447 Large-Cap Value products for 3-year, 5-year and Overall risk-adjusted performance as of September 30, 2020. Morningstar® is a leading provider of independent investment research in North America, Europe, Australia, and Asia (www.corporate.morningstar.com). This is the 19th out of 24 quarters that WI Fidelis has received a 4-star or greater Overall Morningstar Rating. WI Fidelis has received 3-stars or more for 100% of their quarters reported and 1 of only 6 South Carolina RIA firms now receive Morningstar ratings.

"In these challenging times, we are honored to provide our clients and their accounts the time and attention they deserve." —Daniel Wallick, Managing Partner and Chief Investment Officer

Since 2005, South Carolina RIA firm, Wallick Investments, specializing in Strategic Moral Investing (portfolios honoring science and Christian values), 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, call 803-699-9400, e-mail info@wallickinvestments.com or visit wallickinvestments.com.

* © 2020 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. 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.