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FOR IMMEDIATE RELEASE:

Wallick Investments’ Small-Cap Portfolio earns 4-star Morningstar Rating™

Columbia, SC, August 18, 2016 - Wallick Investments’ Small-Cap (Aggressive) Composite portfolio is the latest WI equity strategy to be recognized by Morningstar®, earning 4 Stars for 3-year and overall performance among 209 Small-Cap Blend managers for 2Q, 2016. This portfolio joins and extends the group of Wallick Investments’ portfolios that have earned 4-star or better Morningstar® recognition, including our WI Core Growth and WI Dividend Focused portfolios. We are proud to offer such a diverse array of portfolios which are managed by the same time-tested, disciplined investment process, since 2005, which rely on our proprietary mix of quantitative investment factors. Morningstar® is a leading provider of independent investment research in North America, Europe, Australia, and Asia.

In addition, we are pleased to report that Money Manager Review, the San Franciso-based firm providing independent analysis of private money manager firms since 1987, ranks for 3-year performance Wallick Investments’ Small-Cap (Aggressive) Composite #20 in the nation among Small-Cap Core and Blend managers; Wallick Investments’ Core Growth Composite #13 in the nation among Multi-Cap Core and Blend managers; and our Dividend Focused Composite #13 in the nation among Large-Cap Core and Blend managers.

For the benefit of institutions and other industry experts, Wallick Investments also reports its performance to eVestment Alliance and Informa Investment Solutions (PSN). For more information on any of Wallick Investments’ portfolio strategies, including: Core Growth, Dividend Focused, Small-Cap, Low Volatility/Quality Distribution (LVQD), International, and our moral/ethical-focused Excelsis portfolio, please call us directly at (803) 699-9400. Also feel free to review our Investment Management Overview and quarterly Portfolio Reviews at www.wallickinvestments.com.

Since 2005, Wallick Investments has offered both investment advisory and portfolio management services, eliminating unnecessary fees for clients. Wallick Investments adheres to the Chartered Financial Analyst® Institute Code of Ethics and accepts fiduciary responsibility for client accounts. Wallick Investments’ strategies are available to individuals (IRA, joint, individual, and trusts), institutions (corporate pensions, 401Ks, foundations, endowments) and other non-affiliated advisors. For further information, email Wallick Investments at info@wallickinvestments.com.

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