

Wallick Investments, LLC

Is your money manager a part of your local community? Most investors in the Midlands have a relationship with their financial advisor but actual day to day investment decisions could be made by a mutual fund portfolio manager or by an out-of-state third-party money manager. This does not have to be the case. Recently ranked 22nd among top US Equity Multi-cap Blend Money Managers for 2007 performance by Money Manager Review, Wallick Investments, LLC is conveniently located in Northeast Columbia.

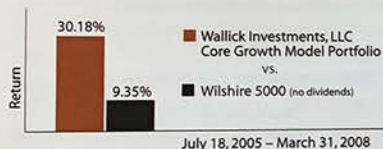
Dan Wallick, managing partner for Wallick Investments, LLC says "individuals, foundations and endowments looking to save money, minimize potential conflicts of interest and hire a local money manager, singularly focused on portfolio management, can open separate accounts with us directly. Individuals working with a professional advisor can either call us or their advisor to discuss partnership opportunities." Dan is a 1991 Phi Beta Kappa honors graduate from the University of South

Carolina. In 2007, he was selected as one of The State Newspaper's "20 under 40." He is currently a Level II candidate in the very demanding CFA program but continues to be active at his church and in the community.

When asked for advice in the current investment climate, Dan replied, "We highly recommend investors develop strict investment strategies and criteria based on common sense and historical success to minimize the potential negative effects of human emotions. Wallick Investments, LLC client

accounts maintain a + or - 10% adherence to a strategic asset allocation. Within these allocations we make small increases to equity when the stock market looks undervalued and small decreases when it looks overvalued. From 2005 until the middle of January 2008 our Core Growth Model held hedges of up to approximately 12% of its total value. In January we reduced these holdings by about half."

For current performance and investment services, visit www.wallickinvestments.com.



Model Portfolio performance excludes fees. Models are developed and managed by Wallick Investments, LLC. They do not represent actual accounts or composites. Each client's portfolio holdings and weightings vary based on individual time frames and risk tolerances. The models display past performance and do not guarantee future results.



FINANCIAL SERVICES

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Number of Employees: 3

Top Executive: Daniel Wallick, Managing Partner

Product or Service: Fee-only registered investment advisory services

Year Founded: 2005



Daniel Wallick

Photo by Moore Photography