Wallick Investments, LLC
For more information contact:
Daniel Wallick, 803.699.9400 ▪ 803.422.4305
danwallick@wallickinvestments.com

For immediate release:

Wallick Investments now offers holistic financial planning

Columbia, SC • March 6, 2024 – South Carolina-based RIA firm Wallick Investments, LLC is proud to announce the addition of a new financial planning service line to complement its long-standing investment advisory and portfolio management services. This new service line, called Fidelis Wealth Planning, continues the same strategic moral approach Wallick Investments has taken since its inception.

At the strategic level, the Fidelis Wealth Planning process will reflect and uphold the professional guidelines of the Certified Financial Planner™ (CFP®) Board of Standards by imitating its thorough process of addressing the comprehensive financial status of each client. At the moral level, the process will construct values-based plans and affirm a virtue-first approach to financial living.

Through Fidelis Wealth Planning, an individual's finances will be viewed with a holistic lens, as a resource, a means to an end and tool for good. Clients will be assisted and accompanied towards good stewardship. Plans will be built around the core values held by each client to assist with the fulfillment of their unique calling. Ongoing advice and education will be given to encourage virtuous financial habits and decisions. Active relationships with clients will be established and maintained with the intention of providing ongoing support and assistance through the different stages of life.

The concrete financial components of Fidelis Wealth Planning are organized into four initiatives: Organize, Optimize, Grow, and Protect. Within these four initiatives, the following areas will be assessed and addressed for the betterment of each client's present and future financial needs: objectives, budgets, cash flows, balance sheets, taxes, debts, investments, retirement plans, education, giving, risk analyses, insurances, and estate plans. All documents can be stored and progress tracked with our customized Fidelis Wealth Planning software.

The Fidelis Wealth Planning service line will be led by Nick Shiver, Director of Wealth Planning at Wallick Investments. For more information, please call 803.699.8828, e-mail nickshiver@wallickinvestments.com, or visit wallickinvestments.com.