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For immediate release:

## 10-year performance & 4-star Morningstar Overall rating for faith- & factor-based WI Fidelis

Columbia, SC—February 11, 2022: Wallick Investments, LLC’s faith- and factor-based separately managed account strategy, WI Fidelis, has received yet again a 4-star Morningstar Rating™ for 3-year, 5-year, Overall, and now 10-year risk-adjusted performance among 147 Mid-Cap Blend products as of December 31, 2021. Since its inception January 2012, WI Fidelis has received a 3-star or greater Overall Morningstar Rating for 100% of quarters rated and a 4-star or greater Overall Morningstar Rating for 24/29 quarters rated. Morningstar® is a leading provider of independent investment research (corporate.morningstar.com).

“Wallick Investments’ stock-selection processes integrate faith-based values and investment science. The biggest concern with such a strategy is what might be given up in investment performance; most studies suggest very little.”  
—Daniel Wallick, managing partner and chief investment officer

Since 2005, Wallick Investments, a registered investment advisory firm specializing in Strategic Moral Investing, has offered both investment advisory and portfolio management services, 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](mailto:info@wallickinvestments.com) or visit [wallickinvestments.com](http://wallickinvestments.com).

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