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For immediate release:

## 4-star Morningstar Rating for Wallick Investments' Fidelis in new Style category

Columbia, SC—May 13, 2021: Wallick Investments, LLC's faith and factor-based separately managed account, Fidelis, was recategorized by Morningstar from Large-Cap Value to Mid-Cap Blend. As of March 31, 2021, WI Fidelis received a 5-star Morningstar Rating™ among 135 Mid-Cap Blend products for 3-year performance, and a 4-star Morningstar Rating for 5-year and Overall risk-adjusted performance. This is the 21st out of 26 quarters that WI Fidelis has received a 4-star or greater Overall Morningstar Rating. WI Fidelis has received a 3-star or greater Overall Morningstar Rating for 100% of quarters reported. Morningstar® is a leading provider of independent investment research (corporate.morningstar.com).

"Wallick Investments' stock-selection processes integrate faith-based values and factor-based investment science. WI Fidelis' success over the last seven years has shown you do not have to give up return to invest in a socially conscious manner." Daniel Wallick, Managing Partner and Chief Investment Officer

Since 2005, Wallick Investments, a registered investment advisory firm specializing in Strategic Moral Investing, offers 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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