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For immediate release:

## Faith- & factor-based Fidelis' 4-star Morningstar Rating continues

Columbia, SC—August 13, 2021: Wallick Investments, LLC's faith- and factor-based separately managed account strategy, WI Fidelis, received a 4-star Morningstar Rating™ for 3-year, 5-year and Overall risk-adjusted performance among 139 Mid-Cap Blend products as of June 30, 2021. WI Fidelis has received a 4-star or greater Overall Morningstar Rating for 22/27 quarters, and a 3-star or greater Overall Morningstar Rating for 100% of quarters. Morningstar® is a leading provider of independent investment research ([corporate.morningstar.com](http://corporate.morningstar.com)).

"For 2Q2021, WI Fidelis' risk-adjusted return was rated in the 18th percentile by Morningstar for Mid-Cap Blend separate account products— meaning we outperformed over 80% of our categorical peers' reported products." 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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