



RIA ■ Strategic Moral Investing

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FOR IMMEDIATE RELEASE:

National ranking for Wallick Investments' Core Growth and Fidelis Composites

Columbia, SC, December 1, 2017 - Morningstar® and *Money Manager Review* have recognized Wallick Investments' performance with high national rankings. In addition to receiving a 4-star Overall Morningstar Rating™ among 155 mid-cap blend products as of September 30, 2017* for the Wallick Investments' Core Growth Composite, *Money Manager Review*, the San Francisco-based firm providing independent analysis of private money manager firms since 1987 ranks the Wallick Investments' Core Growth Composite #3 in the nation for 1-year performance, #4 for 3-year, #5 for 5-year, all among 20 multi-cap blend managers reporting, and #3 in the nation among 18 multi-cap blend managers reporting for 7-year performance for 3Q2017. The goal for Wallick Investments' Core Growth is to outperform its benchmark in all but the most risk-averse market environments. It is an ideal equity portfolio for more growth-oriented investors.

WI Fidelis Composite received a 4-star Overall Morningstar Rating™ among 495 large-cap blend products, a 3-star rating for 3 years among 495 large-cap blend products and a 5-star rating for 5 years among 458 large-cap blend products, all as of September 30, 2017.* *Money Manager Review* ranks the Wallick Investments' Fidelis Composite #7 in the nation among 50 large-cap blend managers reporting for 1-year performance, #19 among 49 managers for 3-year and #5 among 48 managers for 5-year performance for 3Q2017. The goal for Wallick Investments' Fidelis is to outperform its benchmark in all market environments. It is an ideal equity portfolio for both growth and income investors.

For more information on Wallick Investments' equity strategies, including dividend and small-cap portfolios, visit wallickinvestments.com, selecting the *Quarterly Portfolio Review* under the "Performance" tab and/or call Wallick Investments at 803.699.9400.

Since 2005, South Carolina RIA firm Wallick Investments offers both investment advisory and portfolio management services, eliminating unnecessary fees for clients. As a CFA Institute member, Wallick Investments accepts fiduciary responsibility for their clients' accounts. Its strategies are available to individuals (IRA, joint, individual, trusts), institutions (corporate pensions, 401Ks, foundations, endowments) and other non-affiliated advisors.

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