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FOR IMMEDIATE RELEASE:

4-star Morningstar Rating Continues for WI Fidelis

Columbia, SC — August 5, 2020: 1 of only 7 RIA firms in South Carolina to receive Morningstar ratings, Wallick Investments, LLC's Fidelis composite received a 4-star Morningstar Rating™ among 458 Large-Cap Value products for 3-year, 5-year and Overall risk-adjusted performance as of June 30, 2020. Morningstar® is a leading provider of independent investment research in North America, Europe, Australia, and Asia (www.corporate.morningstar.com). This is the 18th out of 23 quarters that WI Fidelis has received a 4-star or greater Overall Morningstar Rating. WI Fidelis has received 3-stars or more for 100% of their quarters reported.

"We're competitive and laser-focused on giving our clients and their accounts the time and attention they deserve."
—Daniel Wallick, Managing Partner and Chief Investment Officer

Since 2005, South Carolina RIA firm, Wallick Investments, specializing in Strategic Moral Investing (portfolios honoring science and Christian values), 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 with strategies available to individuals, institutions and other non-affiliated advisors. For more information on the above and all Wallick Investments' strategies, call 803-699-9400, e-mail info@wallickinvestments.com or visit wallickinvestments.com.

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