

**DANIEL WALLICK** *On himself: "True"*

# Building other people's futures

For Dan Wallick, doing his homework has paid off.

In his 10th-grade economics class, Wallick tracked the stock performance of Nike as part of a class project, analyzing the company's earnings statements.

That spurred him to start reading *The Wall Street Journal* while at South Aiken High School and to study finance and economics at the University of South Carolina.

In college, he participated in a contest by simulating investments in the stock market and won prizes for the largest short-term gains.

"We were buying some of the biggest decliners," Wallick says of that high-risk strategy.

Today, at his small portfolio management firm, Wallick Investments, Wallick says he's more cautious with other people's money — especially since the losses and gains are now real.

"We're (no longer) buying companies that are going out of business," he says.

After time working as an analyst and broker, Wallick, 39, opened his own firm in June 2005, using his own financial models to manage \$10 million of his clients' money.

"I have control over my destiny more," Wallick says of his practice. "I'm better able to do what's best for my client."

— Jason Ryan



GERRY MELENDEZ/GMELENDEZ@THESTATE.COM

**ABOUT WALLICK** *39 years old*

**Why him:** "He is disciplined and very hardworking, always looking out for his clients' best interests. He is understanding and will go to great lengths to explain every detail." — Paul M. Kirschenfeld, client and friend

**Position:** Owner, Wallick Investments

**Before that:** Proposal analyst, BlueCross BlueShield of South Carolina; broker, Merrill Lynch; investment representative, S.C. Bank and Trust

**Education:** Bachelor's degree in finance, USC

**For the greater good:** Soccer coach, Columbia United Football; treasurer, Cub Scouts Pack 733 and Knights of Columbus

**Family:** Wife, Susan; 3 children

**Contact:** (803) 422-4305; danwallick@wallickinvestments.com

**First job:** Throwing newspapers

**Secret craving:** Discover the next Microsoft

**IF THEY ASKED ME . . .**

"You shall love the Lord your God with all your heart, and with all your soul, and with all your mind . . . You shall love your neighbor as yourself."