



Wade Stinnette, Dan Wallick, Susan Wallick & Jake Wallick

For immediate release:

Faith- & factor-based WI Fidelis receives 4-star Morningstar Overall rating 23/28 quarters

Columbia, SC—November 5, 2021: Wallick Investments, LLC's faith- and factor-based separately managed account strategy, WI Fidelis, has received yet again a 4-star Morningstar Rating™ for 3-year, 5-year and Overall risk-adjusted performance among 145 Mid-Cap Blend products as of September 30, 2021. WI Fidelis has received a 4-star or greater Overall Morningstar Rating for 23/28 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).

"It has been a blessing to be able to provide our clients with Morningstar risk-adjusted performance in the top 33% of all US separate account managers in our same style category for over 80% of reporting periods, and 0% of the time in the bottom 33%. It is a testimony to our strategic moral investing processes." 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 or visit wallickinvestments.com.

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