



# WALLICK INVESTMENTS, LLC

RIA FIRM



Overall rating out of 149 Mid-Cap Blend products as of June 30, 2022.†

***As of June 30, 2022, “growth/decline of \$1” comparison for each time period.***

*For more information, see [wallickinvestments.com](http://wallickinvestments.com).*

Portfolio	Category	Value of \$1 1 year	Value of \$1 3 year	Value of \$1 5 year	Value of \$1 10 year
WI Fidelis Composite	US Large-Cap Value	\$0.98	\$1.33	\$1.63	\$2.43
Custom Core Benchmark		\$0.87	\$1.25	\$1.51	\$2.85
<b>Benchmark: Russell 3000 Return</b>		<b>\$0.86</b>	<b>\$1.32</b>	<b>\$1.65</b>	<b>\$3.22</b>

*Find WI composite custom benchmark descriptions on page 8 of Wallick Investments Portfolio Review and Commentary ([wallickinvestments.com](http://wallickinvestments.com)). All portfolio performance is reported excluding fees. WI Composite portfolios are developed and managed by Wallick Investments, LLC. Each client’s portfolio holdings and weightings vary based on individual time frames and risk tolerance.*

*Benchmark returns are reported excluding dividends. The portfolio composites display performance data to illustrate past performance and do not guarantee future results.*

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*Past performance is no guarantee of future results.*