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FOR IMMEDIATE RELEASE:

## 4-star Morningstar Rating for Wallick Investments Fidelis

Columbia, SC — May 13, 2020: Wallick Investments, LLC's Fidelis composite received a 4-star Morningstar Rating™ among 452 Large-Cap Value products for 3-year, 5-year and Overall risk-adjusted performance as of March 31, 2020. This is the 17th out of 22 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. Wallick Investments is 1 of only 7 RIA firms in South Carolina to receive Morningstar ratings. Morningstar® is a leading provider of independent investment research in North America, Europe, Australia, and Asia ([www.corporate.morningstar.com](http://www.corporate.morningstar.com)).

“Our mission is to add value through a disciplined, factor-based investment process— without moral indifference.”  
—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](mailto:info@wallickinvestments.com) or visit [wallickinvestments.com](http://wallickinvestments.com).

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