



Wade Stinnette, Dan Wallick, Susan Wallick & Jake Wallick

FOR IMMEDIATE RELEASE:

4-star Morningstar Ratings Overall continue for Wallick Investments' Core Growth and Fidelis composites

Columbia, SC, May 28, 2019 - Wallick Investments, LLC's chief equity composite strategy, WI Core Growth, received a 4-star Morningstar Rating™ among 162 mid-cap blend products as of March 31, 2019 for 3-year, 5-year, 10-year and Overall risk-adjusted performance.

WI Core Growth history:

- 4-star or greater Overall Morningstar Rating— 21 out of 28 quarters
- 3-star or greater Overall Morningstar Rating— 100% of reporting quarters

Wallick Investments' Fidelis composite received a 4-star Morningstar Rating among 454 large-cap value products for 3-year, 5-year and Overall risk-adjusted performance as of March 31, 2019.

WI Fidelis history:

- 4-star or greater Overall Morningstar Rating— 10th straight quarter
- 4-star or greater Overall Morningstar Rating— 13 out of 18 quarters
- 3-star or greater Overall Morningstar Rating— 100% of reporting quarters

Since 2005, South Carolina RIA firm Wallick Investments, specializing in Strategic Moral Investing, 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.

* © 2019 Morningstar, Inc. All rights reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete, or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results. The Morningstar Rating for funds, or "star rating", is calculated for separate accounts with at least a three-year history. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics.