Wallick Investments, LLC

Registered Investment Advisory Firm

Strategic investing without moral indifference

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L-r clockwise: Dan Wallick, Marc Murray, Wade Stinnette, Susan Wallick
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For immediate release:

Wallick Investments celebrates tenth anniversary

Columbia, SC • August 13, 2015 - Nationally-ranked Wallick Investments, LLC, an SC-based Registered Investment Advisory firm, celebrated its ten year anniversary Tuesday, June 23rd at Stone River in West Columbia. Family, clients and long time supporters gathered for food, music and festivities overlooking Columbia and the beautiful Congaree river.

Daniel Wallick, chief investment officer and managing partner, spoke, thanking and introducing his parents and his wife of 25 years, Susan, Director of Marketing and Communication. Mrs. Wallick introduced her parents and her and Dan's three sons, Jacob (Senior, USC's Darla Moore School of Business), Zachary (Freshman/Sophomore, USC Honors College) and Samuel (Freshman, Spring Valley High School).

Wade Stinnette, principal and senior portfolio manager, continued with introductions of his wife of 34 years, Lannie Stinnette, and their son, Walker. Mr. Stinnette joined the firm in March of this year. Principal and Senior Portfolio Manager Marc L. Murray then introduced his mother, Sandy Murray, his wife, Laura Grooms and their daughter, Olivia. Mr. Murray joined the firm in April of this year.

Mr. Wallick presented a summary of the firms' 10 year portfolio performance. Wallick Investments Core Growth Model is ranked #2 in the nation for 10 year performance among mid-cap blend managers (172.68% without fees) by *Money Manager Review*, a San Francisco-based firm providing independent analysis of private money managers. WI Core Growth Composite is the chief investment strategy for the equity position of Wallick Investments' clients. Wallick Investments continues to outperform its peers, but does so in a unique way. "Strategic investing without moral indifference" means Wallick Investments pays close attention to the activities of the companies owned by their investors. Leveraging technology, companies are eliminated most opposed to values of Christian life. Since June of 2013, all of the Wallick Investments portfolios are managed with this final screen. Wallick Investments stresses performance and investments that improve the lives of all.

Mr. Wallick concluded by thanking everyone who came out to celebrate the firms' achievements. Wallick Investments looks forward to continued success, offering both investment advisory and portfolio management services, eliminating unnecessary fees for clients. As a member of the CFA Institute, Wallick Investments accepts fiduciary responsibility for their clients' accounts. Wallick Investments' strategies are available to individuals (IRA, joint, individual, trusts), institutions (corporate pensions, 401Ks, foundations, endowments) and other non-affiliated advisors. For more information, contact Wallick Investments at 803-699-9400 or visit wallickinvestments.com.