

Columbia firm aims to promote investments in good faith

AMY WISE TAYLOR
THE CATHOLIC MISCELLANY

The Miscellany will run periodic profiles about Catholic-owned businesses.

Name of business:

Wallick Investments, LLC

Owner:

Dan Wallick

Location:

140 Wildewood Park Drive
Palmetto Suite #100
Columbia, SC 29223

Hours of operation:

Monday through Friday
9 a.m. to 5 p.m.

Description:

Wallick Investment, LLC is a fee-only registered investment advisory firm (RIA).

We manage our clients' investment accounts as a fiduciary, which means we keep their best interest before our own. Client accounts include 401(k)s, IRAs (SEP, Traditional, Roth and Rollovers), individual accounts, joint accounts, trusts, endowments, etc. Our fees are similar to a mutual fund and vary depending on an investor's risk tolerance and assets invested.

Home parish:

My wife Susan and I are founding members of Transfiguration Church in Blythewood.

How do you incorporate your faith into your business?

I hope I actually incorporate my business into my faith instead of the other way around.

I have taken steps to accomplish this specifically by creating a separate account, WI Fidelis, which adheres to the U.S. Conference of Catholic Bishops' investment guidelines.

Has your faith led you to make certain sacrifices in the business world?

Faith has prevented me from being all-consumed in the business world.

Choosing to trade money and what it can buy for time with God, family and friends is not really a sacrifice but a gift.



Wallick

How did you get started?

In 2005, when my ex-boss from a previous employer agreed to be my capital partner. I asked him if he had ever thought about helping someone start a business and without a pause he said, "No. Tell me about it."

Tell us about your faith.

I am a convert. After realizing that money, honors and success do not bring long-term peace, and after having attended St. Mary Help of Christians Church in Aiken for many years with Susan, my wife now (girlfriend then), I decided to become more committed to what really matters. While I was co-opping at the U.S. Patent and Trademark office, I went through RCIA at Good Shepherd Catholic Church in Alexandria, Va.

What other involvements do you have with the church or community?

Susan and I, with our sons, Jacob, Zachary and Samuel, were blessed to be founding members of Transfiguration in 1998.

Presently, I am the treasurer of the Knights of Columbus Council 13713 at Transfiguration. I am a member of our evangelization committee and serve as assistant youth minister. Also, for the past nine years, I have been the chair of the awards committee for the Association of Fundraising Professionals National Philanthropy Day.

Previously, I taught CCD, was the chair of the pastoral council and the finance committee, and served as a volunteer youth minister, and a volunteer with the Cub Scouts and Boy Scouts. I have also coached youth soccer and basketball.

IF YOU are a Catholic business owner and incorporate the faith into your workplace, we'd like to hear from you. You must also be an active member of a parish in the Diocese of Charleston. Email Amy Wise Taylor at ataylor@catholic-doc.org.

**SAINT
GREGORY
THE GREAT
CATHOLIC CHURCH**

**Principal, St.
Gregory the
Great Catholic
School (FT)
Bluffton, SC**

Saint Gregory the Great Catholic School, where Faith and the Sciences Excel, a Pre-K through 6th grade Catholic School (effective July 1, 2013), with an enrollment of 200 students, is accepting applications for principal. Located in Bluffton, SC, near Hilton Head Island, our school enjoys an excellent reputation as thoroughly Catholic and academically superior.

SGGCS "is a Catholic community dedicated to the mission entrusted by Jesus Christ to the Church. Our community provides an environment that helps to instill sound ideals, morals, and values guided by the Gospel of Jesus Christ. With God's grace, our students will continue to enlighten their faith through personal prayer

and Christian attitudes." We are accredited by the Southern Association of Colleges and Schools (SACS).

The successful candidate must be a practicing Catholic who is able to continue the spirit of academic achievement and provide essential educational leadership in maintaining a vigorous Christian environment. Candidate must hold a Master's Degree in Administration or Education and have at least 5 years of teaching experience. This position reports to the Pastor.

Salary will be commensurate with degree and experience. Position is available for the 2013 - 2014 school year.

TO APPLY:

Please complete the Diocese of Charleston online application at their website:

www.sccatholic.org/human-resources

and include a curriculum vitae, cover letter, and references.

Additionally, mail official transcript of credits and verification of current school administration certification to:

**Saint Gregory the Great Catholic School
Search Committee
c/o Joseph A. Ruoto III, Parish Manager
333 Fording Island Road, Bluffton, SC 29909**

or by email to:

ParishManager@sgg.cc

All items must be received by Monday, February 18, 2013.

