

Wallick Investments, LLC  
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FOR IMMEDIATE RELEASE:

## 1Q2017 National Ranking for Wallick Investments'

Columbia, SC, May 16, 2017 - Wallick Investments is pleased to be recognized once again for consistency and high level performance across a number of its portfolios for an enduring period of time.  
<http://www.wallickinvestments.com/WISourceDocs2017.html>

Wallick Investments' Fidelis Composite portfolio has been awarded a Morningstar® ranking of 4 stars out of 5 for 5-year and overall performance among over 227 peer managers. Wallick Investments' Fidelis Composite, a combination of award-winning Wallick Investments' Core Growth strategy (#3 in the nation by *Money Manager Review* for 7-year return with 3 stars out of 5 by Morningstar® for overall return) and the WI large-cap value Dividend Focused offering (#28 in the nation by *Money Manager Review* for 7-year return with 3 stars out of 5 by Morningstar® for overall return), is now ranked #4 in the nation by *Money Manager Review* in its category for 5-year performance ending March 31, 2017.

Wallick Investments has always believed that a combination of science, core values and a repeatable process is the "secret sauce" of their portfolio management. WI's diverse array of portfolios, all managed with the same time-tested, disciplined, morally-screened investment process, rely on a proprietary mix of quantitative investment factors. Wallick Investments believes strongly that investors do not have to compromise their values for investment returns, or visa-versa. And though past performance does not guarantee future results, Wallick Investments' celebrates the consistent success of their strategies and the value those strategies bring to their clients.

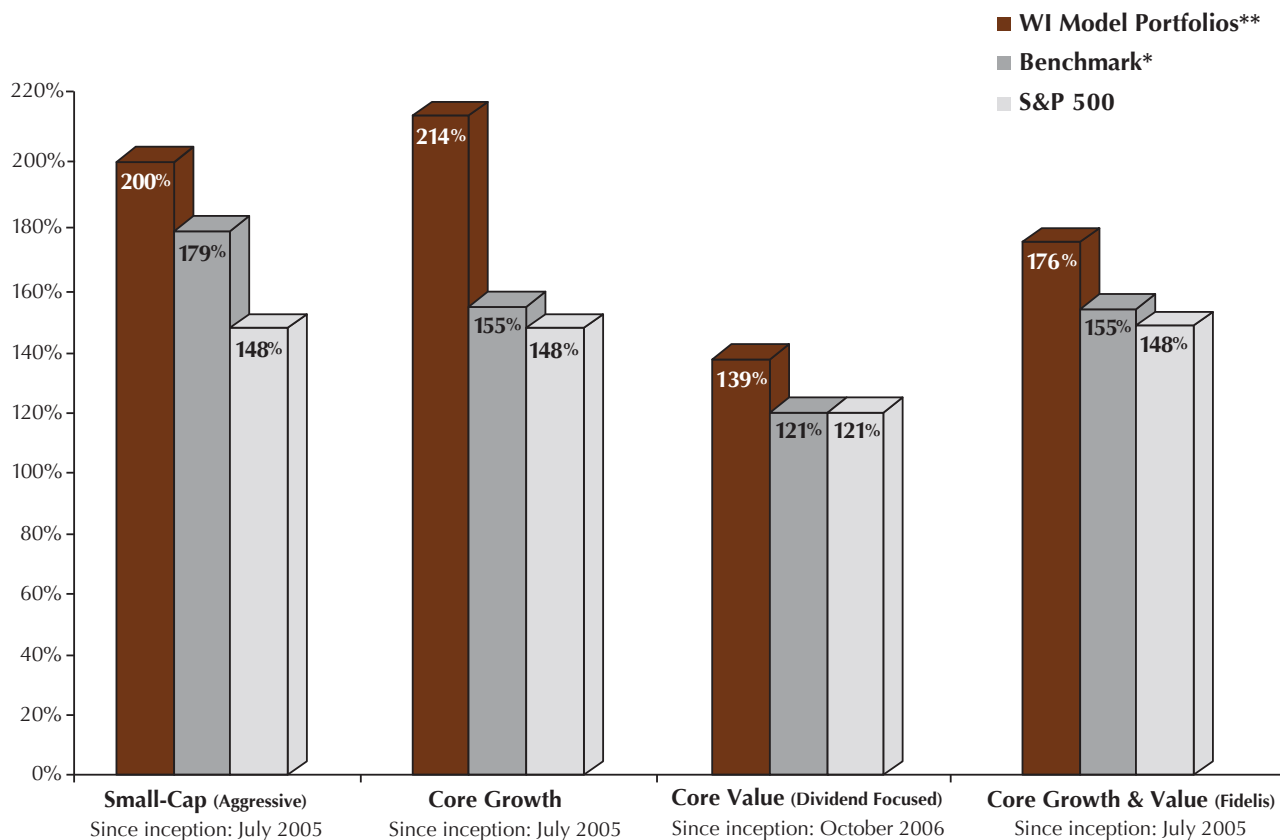
For the benefit of institutions and other industry experts, Wallick Investments also reports its performance to eVestment Alliance and Informa Investment Solutions (PSN). All WI clients enjoy unique access to portfolio management team members, and questions about Wallick Investments' portfolio strategies, including: Core Growth, Dividend Focused, Small-Cap, Low Volatility/Quality Distribution, International, and our moral/ethical-focused, Excelsis portfolio, are welcome.

Since 2005, Wallick Investments has offered both investment advisory and portfolio management services, eliminating unnecessary fees for clients. Wallick Investments adheres to the Chartered Financial Analyst® Institute Code of Ethics and accepts fiduciary responsibility for client accounts. Wallick Investments' strategies are available to individuals (IRA, joint, individual, and trusts), institutions (corporate pensions, 401Ks, foundations, endowments) and other non-affiliated advisors. For further information, call 803.699.9400, visit [wallickinvestments.com](http://wallickinvestments.com) or email [Danwallick@wallickinvestments.com](mailto:Danwallick@wallickinvestments.com).

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## Wallick Investments, LLC Model Portfolios vs. Benchmarks

### Performance through March 31, 2017



**\* Comparable Benchmark Indices:**

**Small-Cap (Aggressive):** S&P 600 represented by iShares S&P600 Index / IJR

**Core Growth:** Wilshire 5000 represented by iShares Total Market Index / VTI

**Core Value (Dividend Focused):** S&P 500 represented by iShares S&P500 Index / IVV

**Core Growth & Value (Fidelis):** Wilshire 5000 represented by iShares Total Market Index / VTI

\*\* WI Model portfolios are developed and managed by Wallick Investments, LLC.

They do not represent an actual account or a composite of accounts.

Each client's portfolio holdings and weightings vary based on individual time frames and risk tolerance.

The portfolio models display performance data to illustrate past performance and do not guarantee future results.

