

Wallick Investments, LLC
For more information contact:
Daniel Wallick, 803.699.9400 ■ 803.422.4305
danwallick@wallickinvestments.com



FOR IMMEDIATE RELEASE:

Susan H. Wallick named principal with Wallick Investments, LLC



Columbia, SC, March 21, 2017 - Nationally-ranked Wallick Investments, LLC, a South Carolina-based Registered Investment Advisory firm, is proud to announce that Mrs. Susan H. Wallick, long-time contributor to Wallick Investments, has been named a principal in the firm. Mrs. Wallick has been a “behind the scenes” partner to WI since its beginnings, but with the firms’ growth and the demands of that success, she is channeling her time and energy more intentionally. Mrs. Wallick shares, “I have always been so very proud of the role Wallick Investments plays in the life of the community and am privileged to engage more fully in its noble mission. My chief responsibility is to always articulate that mission—strategic moral investing. Our investments honor science and faith. This means Wallick Investments implements highly quantitative investment processes while paying close attention to the activities of the companies owned by our investors.”

Utilizing time-tested proprietary processes, Wallick Investments builds individual investment portfolios based on client risk tolerance and time horizons. WI emphasis is on adding significant value, net-of-fees, greater than what a client could earn investing in index funds —and by out-performing industry peers, especially long-term. Wallick Investments Fidelis composite currently holds a 4 out of 5 Star rating by Morningstar®, an industry leader in investment performance evaluation. “I’m proud to work with my husband, Dan, Marc Murray and Wade Stinnette— portfolio managers dedicated to professional excellence, integrity and consistent results.”

Susan H. Wallick is a 1991 Bachelor of Arts graduate of the University of South Carolina with a concentration in Graphic Design. Formally joining Wallick Investments in August of 2013, her chief responsibility is public relations, but also serves in many administrative capacities. Active with family, Transfiguration Catholic Church in Blythewood and community, she enjoys supporting the University of South Carolina, where sons Jake and Zach have matriculated, and Spring Valley High School, where her youngest son, Sam, attends.

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 investment information, visit wallickinvestments.com or email Danwallick@wallickinvestments.com.

###