

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



FOR IMMEDIATE RELEASE:

## Jacob D. Wallick of Wallick Investments, LLC passes Level I CFA® Exam



Columbia, SC, February 28, 2018 - Nationally-ranked Wallick Investments, LLC, a South Carolina-based Registered Investment Advisory firm, is proud to announce that Mr. Jacob (Jake) Wallick, junior portfolio manager and managing partner associate, passed the Level I exam of the CFA Program, administered in Charlotte, NC on December 2, 2017. Mr. Wallick, a 2016 honors graduate from The University of South Carolina's Darla Moore School of Business with a degree in Finance and Management, and directed study in Biology, has plans to prepare for the June 2019 Level II exam.

The internationally recognized Chartered Financial Analyst® credential, administered by CFA Institute, is a graduate level, self-study examination system for investment professionals. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. Successfully passing three levels of examinations, completing a four-year work experience requirement and an annual attestation to ethics ensure career-long professional excellence by those who have earned the charter ([www.cfainstitute.org](http://www.cfainstitute.org)).

Since 2005, Wallick Investments has offered both investment advisory and portfolio management services, eliminating unnecessary fees for clients. Wallick Investments adheres to the CFA 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](http://wallickinvestments.com) or e-mail [info@wallickinvestments.com](mailto:info@wallickinvestments.com). CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.