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FOR IMMEDIATE RELEASE:

## Wallick Investments' Core Growth Composite receives Morningstar's highest rating for risk-adjusted performance

Columbia, SC, May 25, 2018 - Wallick Investments, LLC's chief equity strategy, Wallick Investments Core Growth Composite, received a 5-star Overall Morningstar Rating™ among 157 mid-cap blend products as of March 31, 2018 - Morningstar's highest rating for risk-adjusted performance. This is the 17<sup>th</sup> quarter out of 24 that Wallick Investments' Core Growth has received a 4-star or greater Overall Morningstar Rating. WI Core Growth has received a 3-star or greater Overall Morningstar Rating for 100% of its reporting quarters.

Wallick Investments Fidelis Composite received a 4-star Overall Morningstar Rating™ among 499 large-cap value products as of March 31, 2018. This is the 6<sup>th</sup> straight quarter and 9<sup>th</sup> out of 14 that Wallick Investments' Fidelis has received a 4-star or greater Overall Morningstar Rating. WI Fidelis has received a 3-star or greater Overall Morningstar Rating for 100% of its reporting quarters.

The Morningstar Rating for funds, or "star rating", is calculated for separate accounts with at least a three-year history. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics.\*

Since 2005, South Carolina RIA firm Wallick Investments offers both investment advisory and portfolio management services, eliminating unnecessary fees for clients. As a CFA Institute member, Wallick Investments accepts fiduciary responsibility for their clients' accounts, with strategies available to individuals, institutions and other non-affiliated advisors. For more information, contact Wallick Investments at 803-699-9400 or visit [wallickinvestments.com](http://wallickinvestments.com).

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