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FOR IMMEDIATE RELEASE:

Jacob D. Wallick earns CFA® charter

Columbia, SC, August 11, 2022 - Nationally-ranked Wallick Investments, LLC, a South Carolina-based Registered Investment Advisory firm, is proud to announce that Mr. Jacob (Jake) Wallick, portfolio manager and managing director of Wallick Institutional, has passed the Level III exam of the Chartered Financial Analyst® Program, completed all program requirements and is now a CFA charterholder—"one of the highest distinctions in the investment management profession."*

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 a directed study in Biology, is the investment committee chair overseeing Wallick Investments' Fidelis Multi-cap Multi-factor Index— a benchmark combining factor investing with faith-based filtering for equity selection (WIFidelisIndex.com).

Mr. Wallick shares, "As a CFA charterholder, I enjoy applying what I have learned to my firm's processes, benefiting our clients. This journey has been very rewarding."

The internationally recognized Chartered Financial Analyst® credential, administered by the 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. The CFA Program requirements of passing three levels of examinations, completing 4,000 hours of work experience, letters of recommendation, an annual attestation to ethics, and CFA Institute membership fortifies career-long professional excellence for those who have earned the charter. This includes "more than 190,000 investment professionals worldwide...."**

*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 more information, visit wallickinvestments.com or e-mail info@wallickinvestments.com. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute. *https://www.cfainstitute.org/en/programs/cfa **https://www.cfainstitute.org/about/press-releases/2022/cfa-institute-reports-results-for-cfa-program-level-III-testing-in-May*