

Morningstar® UK Adviser Events

Adviser Forums Calendar	July 6	2011	Bristol	November 30	2011	Liverpool	▶ Click Here to register for an Adviser Forum See below to view full agendas.
	September 14	2011	London	December 13	2011	London	
	October 11	2011	Edinburgh				
	November 2	2011	Birmingham				

Morningstar Adviser Forum Roadshows

The Morningstar Adviser Forum brings together local financial advisers to provide valuable insight from Morningstar industry experts and offer practical instruction on ways to improve your business using Morningstar products and services. The 3.5 CPD point accredited half-day events are complimentary with lunch included. If you are new to Morningstar, our user forums provide advisers with a great opportunity to learn more about how our adviser offerings can

help you save time, become more valuable to your clients and establish a compliant process. Additionally, Adviser Workstation users benefit from one-on-one training and sharing of best practices with product trainers and fellow users. Come join us at an Adviser Forum in your area to see how Morningstar services can help you operate more efficiently, make more informed decisions and enhance your client service.

Genuinely educational rather than sales led, if an adviser wants to increase their level of investment understanding and how to improve their offering to their clients; this is a good event to attend. Morningstar provides greater clarity on how we will be able to improve our own offering to clients, as well as managing our business in a more modern and technological way.

– Tony Batt, Cusack Financial Management Ltd.

I found the forum very useful on a number of levels. Firstly I was introduced to services that I had not previously considered. Secondly I was able to mix with other users and exchange experiences. Lastly I was able to receive one-on-one training tailored to my specific needs. There was a real buzz about the day and the environment was very conducive to learning. Well done and keep it up!

– Peter Sudlow, Sapienter Wealth Management

Morningstar Investment Conference

15–16 May 2012, Riverbank Park Plaza Hotel London. Interact with prominent financial experts, connect with peers and discover innovative strategies from leaders in

their field. Please email to find out more: events.rsvp@morningstar.com

Morningstar Adviser Forum Schedule

6 July 2011
Bristol

- ▶ Morningstar Adviser Workstation Seminar –*Jim Murphy, Adviser Workstation Trainer, Morningstar*
- ▶ Online Communications to Benefit your Business –*Catherine McEwing, Head of Individual Software & Holly Cook, Online Editor*
- ▶ Transparency of Closed-End Funds –*Jackie Lockie, Training Manager, AIC*
- ▶ Gap Fill –Principles of Investment Planning –Portfolio Construction

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Morningstar Adviser Forum Schedule cont.	14 September 2011 London	<ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Ana Georgiou, Adviser Products Manager, Morningstar</i> ▶ The History and Economics of Stock Market Crashes – <i>Dr. Paul Kaplan, European Quantitative Research Director, Morningstar</i> ▶ Gap Fill - Investment Trusts: Benefits and Opportunities – <i>Jackie Beard, Director of Closed End Fund Research, Morningstar</i> ▶ Gap Fill - Transparency of Closed-End Funds – <i>Ian Sayers, Director General of the AIC</i>
	11 October 2011 Edinburgh	<ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Ana Georgiou, Adviser Products Manager, Morningstar</i> ▶ A Discussion with OBSR – <i>Emma O’Neil, Investment Research Analysts / Richard Whitehall, Investment Research Analyst</i> ▶ Exploring ETF Investing – <i>Ben Johnson, Associate Director of European ETF Research, Morningstar</i> ▶ Gap Fill - Transparency of Closed-End Funds – <i>Annabel Brodie-Smith, Communications Director of the AIC</i>
	2 November 2011 Birmingham	<ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Ana Georgiou, Adviser Products Manager, Morningstar</i> ▶ Exploring ETF Investing – <i>Ben Johnson, Associate Director of European ETF Research, Morningstar</i> ▶ Gap Fill – Merits and Limitations of Main Investment Theories – <i>Dr. Paul Kaplan, European Quantitative Research Director, Morningstar</i> ▶ Gap Fill - The History and Economics of Stock Market Crashes – <i>Dr. Paul Kaplan, European Quantitative Research Director, Morningstar</i>
	30 November 2011 Liverpool	<ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Ana Georgiou, Adviser Products Manager, Morningstar</i> ▶ A Discussion with OBSR – <i>Emma O’Neil, Investment Research Analysts / Richard Whitehall, Investment Research Analyst</i> ▶ Investment Trusts: Benefits and Opportunities – <i>Jackie Beard, Director of Closed End Fund Research, Morningstar</i> ▶ Gap Fill – Risk on Investment Performance – <i>Morningstar ETF Research Team (speaker TBC)</i>
	13 December 2011 London	<ul style="list-style-type: none"> ▶ Morningstar Adviser Workstation Seminar – <i>Ana Georgiou, Adviser Products Manager, Morningstar</i> ▶ Gap Fill – Understanding the Principles of Investment Planning- Portfolio Construction – <i>Investment Consultancy Team, OBSR a Morningstar company</i> ▶ Gap Fill – Principles of Investment Planning - Portfolio Construction – <i>Morningstar Investment Consulting Team (speaker TBC)</i>