Morningstar® Adviser Forum | Chelmsford 2019

Register Now

Ivy Hill Hotel, Chelmsford
Thursday 14 March 2019

Please join us for our Adviser Forum on 14 March at Ivy Hill Hotel

Reasons You Should Attend

- Collect structured CPD
- Learn about Morningstar's Managed Portfolio Service & Adviser Workstation
- Learn about Morningstar's research and rating methodology and how we can partner with advisers.

09:00 – 09:30
Registration and Networking Breakfast

09:30 – 10:00
Introduction to Morignstar
This session will give you an overview as to how Morningstar can support you in your investment process, whilst remaining focused on your clients' financial goals and adding value at each stage of the advice process. Craig will then look at how our fundamental approach to investing can help you and your clients.

James Street, Adviser Relationship Manager, Morningstar; Craig Coates, Business Development Manager, Morningstar

10:00 – 10:30
Morningstar Manager Research
Morningstar Analysts will bring to life their research, and lift the bonnet on some topical funds, where things aren't always as they seem.

David Holder, Senior Analyst, Manager Research Ratings, Morningstar

10:30 – 10:45
Refreshment Break

10:45 – 11:15
A natural fit? Using investment trusts for retirement income
With all the talk of sustainable withdrawal rates, annuities versus drawdown and sequencing risk, one potential solution for retirement income tends to be overlooked. In this presentation, Nick Britton demonstrates how investment trusts can offer stable and sustainable retirement income for the right client.

Nick Britton, Head of Intermediary Communications, Association of Investment Companies

11:20 - 11:50
The Senior Managers and Certification Regime – how does it impact me?
The aim of the session is to take a look at the recent guidance and policy statements published by the FCA on what the Senior Management Regime actually means to firms and its impact on personal investment firms. Melony will then provide some practical suggestions on how to approach the project and be able to evidence that the firm is meeting its regulatory requirements.

Mel Holman, Director & Financial Planner, Compliance and Training Solutions Ltd

11:15 – 11:45
Closing Remarks

Craig Coates, Business Development Manager, Morningstar

12:00 – 12:45
Networking Lunch
Over lunch you will have the opportunity to choose a roundtable session to learn more about our Adviser Workstation or Managed Portfolios.