

Register Now

Morningstar® Adviser Forum

Edinburgh 2019

Sheraton Grand Hotel, Edinburgh Tuesday 12 March 2019

Please join us for our Adviser Forum on
12 March at [Sheraton Grand 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 Morningstar

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. Stephanie will then look at how our fundamental approach to investing can help you and your clients.

Phoebe Elia, Adviser Services Team Manager, Morningstar; Stephanie Williamson, Business Development Manager, Morningstar

10:10 - 10:40

Incorporating Sustainability Into Your Practice

As more people become environmentally and socially aware, sustainable investing is becoming mainstream. See how our ratings and research can help you in addressing your clients' preferences regarding sustainability and integrating these in your advisory and product selection process.

Hortense Bioy, Director, Sustainability Research, Morningstar

10:30 – 10:45

Refreshment Break

10:45 – 11:15

The evolving retirement market post-freedoms

Matt will look at the direction of travel in the retirement market since the introduction of pension freedoms, including consideration of adviser, customer and provider perspectives. Through its core company assessment work AKG has closely monitored the evolving strategies of providers across the retirement market since the changes came into force. And in the production of pension freedoms themed publications in 2018 AKG carried out market research with both adviser and customer audiences which will bring further colour to this session about the evolving retirement market.

Matt Ward, Communications Director, AKG

11:15 – 11:45

To be Announced

11:45 – 12:00

Closing Remarks

Stephanie Williamson, 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.