Morningstar® Adviser Forum | Newmarket 2019

Register Now

Jockey Club Rooms, Newmarket
Wednesday 23 January 2019

Please join us for our Adviser Forum on 23 January at the Jockey Club Rooms.

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 Explore divergent capital market developments and learn about Morningstar's perspective on them

09:00-09:30
Registration and Networking Breakfast

09:30 - 09:40
Welcome Address

Phoebe Elia, Adviser Services Team Manager, Morningstar

09:40 - 10:10
A Valuation driven view on markets
This session will look at recent events and assess their impact on asset-class valuations. Whether its US Government Bonds, UK Stocks or Emerging Markets Debt. Mark will highlight our current conviction levels and discuss positioning in the context of Morningstar's Managed Portfolios.

Mark Preskett, Portfolio Manager, Multi-Asset Portfolio Management, Morningstar Investment Management

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

10:40 - 10:50
Refreshment Break

10:50 - 11:20
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

11:50 - 12:05
Closing Remarks

Phoebe Elia, Adviser Services Team Manager, Morningstar; Craig Coates, Business Development Manager, Morningstar

12:05 - 13:00
Networking Lunch
Over lunch you will have the opportunity to choose a roundtable session to learn more about our Adviser Workstation or Managed Portfolios.