

Register Now

Morningstar® Adviser Forum

Southampton 2019

The Ageas Bowl, Southampton Wednesday 13th February 2019

Please join us for our Adviser Forum on
13 February at [The Ageas Bowl](#).

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

Phoebe Elia, Adviser Services Team Manager, Morningstar; John Harper, 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

Finding Value in Financial Markets Today

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. Dan will highlight our current conviction levels and discuss positioning in the context of Morningstar's Managed Portfolios.

Dan Kemp, Chief Investment Officer EMEA, Morningstar

11:15 – 11:45

How is retirement advice evolving?

Miranda will share some of her latest research on how retirement advice is evolving. The presentation will look at CRPs, how advisers are managing income in retirement, the make-up of retirement portfolios and getting more from drawdown.

Miranda Seath, Research Analyst, NextWelath

11:45 – 12:00

Closing Remarks

John Harper, 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.