

# Morningstar® Adviser Forum Breakfast Briefing

## 23 February 2012, Cardiff

### Agenda

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Please join us for the Cardiff Adviser Forum on 23 February at the [Barcelo Angel Hotel](#).

To book your place, please [click here](#).

#### Reasons you should attend

- ▶ Attendance is free of charge and includes refreshments
- ▶ Collect 3.5 CPD points
- ▶ Learn how to better manage client portfolios
- ▶ Learn how new Morningstar Analyst Ratings can support you
- ▶ Learn how to have an independent AND efficient investment process

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09:15

#### Registration and refreshments

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09:45

#### Adviser Workstation Seminar

With RDR approaching, we demonstrate how to add value to your service proposition, streamline your advice process and strengthen your audit trail using Adviser Workstation.

*Tarik Alalami, Adviser Workstation Sales Manager, Morningstar*

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10:15

#### Morningstar's New Global Fund Report

Dan Lefkovitz of Morningstar's European Fund Research Team will discuss the firm's new Analyst Ratings and research report. Dan will explain how the Analyst Rating and Report should best be used by advisers and what differentiates it from the competition. He will also explain the Analyst Rating's positioning vis-à-vis the Morningstar 'Star' Rating and the OBSR Rating.

*Dan Lefkovitz, European Fund Research, Morningstar*

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10:45

#### Refreshments

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