

Morningstar® Adviser Forum and Investment Trust Asset Management Briefing, 15 March 2012, Edinburgh

Agenda

Please join us for an Adviser Forum and Executive Briefing - 15 March at [The Scotsman](#).

This is a great event to network with both your peers and asset managers. The first half of the event is for Advisers only, focussing on business practice efficiencies through technology and building your business profile through an online presence.

In the second half, Investment Trust asset managers will join you to listen to an Executive Briefing on the newly launched Morningstar Investment Trusts Analysts Ratings. You will be the first to be given a view of the second release of ratings.

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

Reasons you should attend

- ▶ Learn about the new Investment Trust ratings and research
- ▶ Network with Advisers, senior Investment Trust representatives and Morningstar
- ▶ Collect 5 CPD points and gap fill credits: IFP# 129 PFS/CII# 25
- ▶ Learn how to better manage client portfolios
- ▶ Learn how to improve your website

14:30

Registration and refreshments

15:00

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.

Anastasia Georgiou, Head of Adviser Workstation, Morningstar

15:30

Online Client Communications

Explore best-practice “do’s and don’ts” of designing, building and maintaining an effective adviser website: Covering search engine optimisation, website analytics and social media.

Catherine McEwing, Head of Individual Software, Morningstar

16:00

Refreshments and networking

16:30

Executive Briefing: Analyst Ratings for Investment Trusts

Following the recent launch of Morningstar’s Analyst Ratings for Investment Trusts at the start of 2012, we will be announcing the latest funds to be rated as well as discussing the methodology behind the ratings and their importance for the industry. There will also be a Q&A session offering you the opportunity to pose questions to members of the research team.

Jackie Beard, Head of Closed-end Fund Research, Morningstar. Ian Sayers, Director General, the Association of Investment Companies

17:30

Networking drinks reception