

# Morningstar® Adviser Forum

## 27 March 2012, Exeter

### Agenda

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Please join us for the Adviser Forum on 27 March at the [Thistle Exeter Rougemont](#).  
To book your place, please [click here](#).

#### Reasons you should attend

- ▶ Attendance is free of charge and includes refreshments and lunch
- ▶ Collect 5 CPD points and gap fill credits: IFP# 95-98, 156, 157 PFS/CII# 18-21, 57-65
- ▶ See 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, AWS Sales Manager, Morningstar*

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10:15

#### OBSR Analyst Insight

OBSR's qualitative research team will provide insight on topical industry issues and show you how qualitative fund analysis can help your clients to achieve their investment objectives.

*Richard Whitehall, Investment Research Analyst, Morningstar OBSR*

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10:45

#### Refreshments

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11:00

#### 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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11:45

#### Asset Allocation for the 21st Century

This presentation first reviews the principles of asset allocation in the light of both investment theory and capital market history, highlighting both the strengths and limitations of putting the standard models into practice. It then shows how the theory can be updated to take into account the realities "fat tails" and market crashes and put into practice using new tools made possible by modern computer technology.

*Dr. Paul Kaplan, European Quantitative Research Director, Morningstar*

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12:00

#### Networking lunch followed by Adviser Workstation client training sessions

To book your place and schedule a training session, please [click here](#).