

Morningstar® Adviser Forum

15 March 2012, Glasgow

Agenda

Please join us for the Adviser Forum breakfast briefing on 15 March at the [Grand Central Hotel Glasgow](#).
To book your place, please [click here](#).

Reasons you should attend

- ▶ Attendance is free of charge and includes refreshments
- ▶ Collect 3.5 CPD points and Gap Fill credits: IFP# 128-129, PFS/CI# 25
- ▶ Learn how to better manage client portfolios
- ▶ Improve a compliant investment process

09:00

Registration and refreshments

09:30

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

10:10

Benefits and Opportunities for Closed-end Funds

Consider the compelling characteristics and portfolio-enhancing benefits of Investment Trusts and learn how to use our qualitative analysis to help you make the most educated selections. This session will give you the ability to analyse the characteristics, inherent risks, behaviours and relevant tax considerations of closed-end funds.

Jackie Beard, Director of Closed-end Fund Research, Morningstar

10:50

Refreshments and depart

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

[Click here](#) to watch what other advisers say about our forums

"Genuinely educational rather than sales led, if an adviser wants to increase their level of investment understanding and how to improve their offering to their clients; this is a good event to attend. Morningstar provides greater clarity on how we will be able to improve our own offering to clients as well as managing our business in a more modern and technological way. "

– Tony Batt, Cusack Financial Management Ltd.

"I found the forum very useful on a number of levels. Firstly I was introduced to services that I had not previously considered. Secondly I was able to mix with other users and exchange experiences. Lastly I was able to receive one-on-one training tailored to my specific needs. There was a real buzz about the day and the environment was very conducive to learning."

– Peter Sudlow, Sapienter Wealth Management