

Morningstar Investment Management Europe Due Diligence Meetings

Our Due Diligence Meetings are an opportunity to meet with the senior management, investment management and adviser services teams at Morningstar Investment Management Europe. Advisers will be able to undertake detailed due diligence on Morningstar's Managed Portfolio Service, in line with the findings of the FCA's recent thematic review on assessing suitability.

The meetings are held quarterly at Morningstar's office in London allowing advisers to meet the entire investment team.

Venue: Morningstar, 1 Oliver's Yard, 55-71 City Road, London, EC1Y 1HQ
2018 Dates: Weds 28th Feb -- Weds 23rd May -- Weds 5th Sept -- Weds 5th Dec

Agenda

Due Diligence Meeting

- 09:15 - Registration at Morningstar Office
- 09:30 - Welcome and introduction to Morningstar Investment Management
- 09:45 - Rethinking Advisers as Behavioural Coaches
- 10:30 Morningstar Investment Principles
- 10:45 - Capital Markets Research and Asset Allocation
- 11:15 - Coffee with Dealing Operations Team
- 11:30 - Portfolio Construction & Management
- 12:00 - Manager Research & Selection

- 12:30 - Lunch with Portfolio Management and Operations Team

- 13:00 - Tour of Morningstar Offices
- 13:30 - Introduction to Active Portfolios
- 13:45 - Introduction to AVIVA Governed & Passive Portfolios
- 14:00 - Introduction to Real Return Portfolios
- 14:15 - Introduction to Income Portfolios
- 14:30 - Tea with Sales team
- 14:45 - How do we keep you in the loop? General communication and using the Client Website Demonstration
- 15:15 - Close & Departure

Morningstar Investment Management Europe Ltd is authorised and regulated by the Financial Conduct Authority to provide services to professional clients. Morningstar Managed Portfolios are intended for citizens or legal residents of the United Kingdom. These portfolios can only be made available through the use of an Investment Adviser appropriately authorised and regulated by the Financial Conduct Authority.