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Upcoming Events in 2012

We have a few exclusive subscriber events coming up. With the launch of our new Morningstar Analyst Rating and Global Fund Report, we are offering complimentary training sessions in our Chicago office. On Thursday, March 29th and Thursday, April 19th, Morningstar analysts will address the new Analyst Rating and Global Fund Report and changes to the Stewardship Grade methodology. Space is limited, so please call today to learn more about the agenda for these free classes and to secure your spot. In addition, we are also hosting our seventh annual Advisor User Forum on Wednesday, June 20th, followed immediately by the Morningstar Investment Conference, which continues through Friday, June 22nd. We're offering an early bird discount if you sign up for these events by March 15th. To learn more, please call 866 215-2507.

Presentations and Education Updates for 2012

Featuring 23 presentations and three Sales Ideas, this all-in-one marketing tool is the easiest way for advisors to discuss today's most pressing financial topics, set appropriate investment expectations, and keep their brands top of mind with current and prospective clients. For 2012, we are adding an exchange-traded funds presentation, which highlights certain features unique to ETFs, such as the creation/redemption mechanism and the premium/discount phenomenon. It also compares ETFs with index funds, mutual funds, and stocks, and concludes by looking beyond expense ratios to consider the total cost associated with buying an ETF. A more advanced set of slides delves deeper into three specific ETF types: commodity, leveraged/inverse, and exchange-traded notes. For additional product information, please call 866 608-9571.

Insurance Group Separate Accounts (IGSA) Moving to Variable Annuities Universe

With the March release, we will transition all IGSA data from the Separate Accounts (SA) Universe to our Variable Annuities Advanced product. This transition will allow us to provide improved data and reporting for these securities, as well as better representation of them within our Defined Contribution model reports. These securities will no longer be included in the SA universe. If you are currently using SA for data on IGSA's, please call 866 215-2507 to ensure that you can access them through the VA Advanced module.

Best regards,

Brian Cullen
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Morningstar, Inc.