

Morningstar Management Behind the Moat Conference

Chicago 2014

September 17–18, 2014
Morningstar Global Headquarters
Chicago, IL

We would like to invite you to present at the 2014 Morningstar Management Behind the Moat Conference, a premier venue to meet with analysts and portfolio managers from leading investment management companies.

Benefits of Presenting

- ▶ An invitation-only opportunity to present to an audience of long-term oriented institutional investors.
- ▶ A chance to discuss your firm's competitive advantages with investors in two formats; choose from a traditional presentation or an analyst-led fireside chat.
- ▶ The opportunity to have one-on-one meetings with investors.

RSVP

For questions or to confirm your participation in the 2014 Management Behind the Moat Conference, please contact your relevant analyst or:

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The following firms registered for the 2013 Management Behind the Moat Conference:

Abbot Downing	Cypress Capital	Kayne Anderson	Scout Investments
Alfa Insurance	Dana Investment Advisors	KGS-Alpha Capital Markets	Segall, Bryant and Hamill
Allstate	Destination Wealth Management	LaSalle Street Capital Management	Sentinel Investments
Anderson Growth Partners	Disciplined Growth Investors	Lawson Kroeker	SG Capital Management, LLC
Ariel Investments	Edward Jones	Loop Capital	Shoreline Financial Advisors, LLC
Arthur P. Soter	EPIQ Partners	MainStreet Advisors	South Dakota Investment Council
Artisan Partners	Everence Financial	Mairs and Power	St. James Investment Co., LLC
Atlanta Capital	Fairpointe Capital, LLC	Marcus Asset Management	Stewart & Patten, LLC
Auto-Owners Insurance Co.	Fidelity Investments	MB Financial Bank	SVA Plumb Wealth Management
Badgley Phelps	Fiduciary Trust	Mid-Continent Capital, LLC	TAMRO Capital Partners
Barvest Inc.	First Community Financial Partners	Modern Woodmen of America	The Ithaca Group, LLC
Bessemer Investment Management	Fortaleza Asset Management	Momentum Strategic Advisors	TNB Financial
Birch Hill Investment Advisors	FOUR Capital Partners Limited	Morgan Stanley	Toron AMI International Asset Management
Blue Shores Capital	Franklin Street Partners	Morgan Stanley Wealth Management	Trust Company of the West
BML Capital Management, LLC	Galibier Capital	Nelson Capital Management	UBS
BMO Asset Management	Geneva Investment Management of Chicago, LLC	Northern Trust	UBS Financial Services
Bright Rock Capital	Goelzer	Oak Ridge Investments	UBS Global Asset Management
Busey Trust Company	Golub Group	Old Republic	UMB Financial Corporation
Cabrera Capital Markets	Granite Investment Advisors	Oppenheimer Funds	Union Bank & Trust
Caisse de depot	Greenleaf Trust	Pallister Bay	Uniplan Investment Counsel, Inc.
Capital Innovations LLC	Grey Owl Capital Management	Peak6 Investments	Waddell & Reed
CapitalAtWork	H.M. Payson & Co.	Perkins Investment Management	Washington Capital Management, Inc.
Carnegie Investment Counsel	Harris Associates L.P.	Plunkett & Associates	WCM Investment Management
CastleArk Management, LLC	HC Financial Advisors	Polar Capital	Welch & Forbes
Catawba Capital Management	Hilliard Lyons	Principal Global Investors	Wellington Management Company
Century Capital Management	Hokanson Associates	Putnam Investments	Wells Fargo Advisors
Champlain Investment Partners	Hollow Brook Wealth Management	Richardson GMP	Wells Fargo Funds Management Group
Channing Capital Management, LLC	Hopwood Financial Services, Inc.	RiverPoint Capital Management	Westfield Insurance Group
Check Capital Management Inc.	HSBC Global Asset Management (UK) Limited	RLI Insurance Group	Westwood Management
Chesney & Company	Huizenga Capital	RM Davis	William Blair & Co
Clarkston Capital Partners	Incapital LLC	RMB Capital Management	William Harris Investors
Coe Capital Management	Institutional Capital	RREEF Management LLC	Ziegler Lotsoff
Columbia Wanger Asset Management	Invesco	Sanibel Captiva Investment Advisers	Zuckerman Investment Group, LLC
Copeland Capital Management	Investment Management of Virginia, LLC	Saratoga Research & Investment Management	
Cornell Pochily Investment Advisors, Inc.	Iron Compass	Schaper, Benze & Wise Investment Counsel, Inc.	
Crystal Rock Capital Management	JHL Capital Group	Schwerin Boyle	