

Adviser Workstation Training Day

Wednesday, November 15th, 2017

Morningstar U.K.
1 Oliver's Yard
55-71 City Road
EC1Y 1HQ London

Register Now!

Join us for a complimentary, CPD accredited hands-on workshop designed to help you fully leverage the investment research platform's powerful capabilities and sophisticated functionality. Our Adviser Workstation experts will help you navigate key applications to create and manage your multi-manager portfolios, show you how to create customised reports and presentations that clearly communicate your results, and how to analyse your portfolios' performance.

Reasons you should attend:

- ✓ Best practices to analyse various types of investments
- ✓ CPD accredited
- ✓ Tips and tricks to make your workflow more efficient
- ✓ Proficiency in using the analytical tools in Adviser Workstation for more rigorous research and analysis
- ✓ The skills to create reports and presentations that clearly communicate your results

09:00-09:30

Welcome breakfast

09:30-10:00

Market Overview

One of our in-house analysts will be presenting a general market overview, looking at key themes and events over the last few months, with an outlook on the year ahead.

10:00-11:00

Client Management and Importing

Learn how to import client information with ease, and manage key accounts using our sophisticated reporting function.

11:00-11:15

Tea break

Take the opportunity to connect with other invites, your account manager, or our Client Service Representatives

11:15-12:15

Investment Planning

Learn more about this powerful tool which helps you optimise your portfolios' asset allocation.

12:15-13:15

Lunch break

Further opportunities to network with other guests and speak with our Adviser Workstation specialists. There will be food provided by us.

13:15-14:15

MiFID II

Learn more about MiFID II and how you can use Adviser Workstation to manage your clients' investments as this is implemented.

14:30-16:30

One-on-one training sessions

Book in a 30-minute slot training slot with one of our Adviser Workstation specialists. Feel free to use our office space whilst you wait for your session.