
Morningstar Announces Conference Speakers

By Editor Test *Wed, May 26, 2010*

Jeffrey Gundlach, co-founder, CEO and chief investment officer of DoubleLine Capital, will speak on June 23; and Bill McNabb, president and CEO of Vanguard, will address attendees on June 24.

Morningstar, Inc., will host its 22nd annual investment conference for financial advisors Wednesday, June 23 through Friday, June 25, at McCormick Place Convention Center in Chicago.

Jeffrey Gundlach, co-founder, CEO and chief investment officer of DoubleLine Capital, will speak on June 23; and Bill McNabb, president and CEO of Vanguard, will address attendees on June 24.

General sessions will feature:

- Steve Romick of First Pacific Advisors, LLC; and Rudolph-Riad Younes of Artio Global Investors will discuss macro-economic views from the perspective of a stock fund manager on June 23.
- Hersh Cohen, ClearBridge Advisors; Don Kilbride, Wellington Management; and Joe Matt, Capital Research Global Investors; will share their approaches to dividend investing on June 24.
- Bob Reynolds, president and chief executive officer of Putnam Investments, will take part in a one-on-one conversation with Morningstar's Don Phillips on June 24 about issues surrounding investing for retirement.
- David Corkins, Arrowpoint Partners; Charles de Vault, International Value Advisors, LLC; and Hassan Elmasry, Independent Franchise Partners; will discuss where they are finding investment opportunities and their key learnings from recently helping to build new firms and ventures on June 25.
- Staley Cates, Longleaf Partners; Bill Miller, Legg Mason Capital Management; and Richard Freeman, Legg Mason ClearBridge; will close the conference on June 25 by discussing where to find tomorrow's great long-term investments.

As part of the conference's "Investing 501" sessions, John Calamos of Calamos Funds will talk about investing in convertibles (June 24.); Rob Arnott of Research Affiliates will explore tactical asset allocation (June 24.); and behavioral finance expert and Terry Burnham of Acadian Asset Management, LLC, will talk about his book *Mean Markets and Lizard Brains* (Wiley, 2005) to improve your investment strategy (June 25.).

Breakout sessions on June 24 include:

- Andy Acker of Janus Global Life Sciences Fund and Kris Jenner of T. Rowe Price Health Sciences Fund, who will analyze trends in healthcare investing in the wake of that industry's changing landscape.
- Philippe Brugere-Trelat, Franklin Mutual Series; Rob Gensler, T. Rowe Price; and Daniel O'Keefe of Artisan Partners; who will offer their take on global stocks.
- Frank Armstrong, Investor Solutions; Christine Fahlund, T. Rowe Price; and Tom Idzorek, Ibbotson Associates; who will tackle the issues surrounding income strategies for retirees.

- Brent Lynn, Janus; Wendy Trevisani, Thornburg Funds; and Mark Yockey, Artisan Partners; who will debate three different approaches to foreign stocks.
- John Ameriks, Vanguard; Jerome Clark, T. Rowe Price; and Anne Lester, JP Morgan Asset Management; who will provide their asset allocation guidance and thoughts on retirement portfolio construction.

Breakout sessions on June 25 include:

- Curtis Arledge, BlackRock; Michael Hasenstab, Franklin Templeton; and Christine McConnell, Fidelity; who will talk about the challenges ahead for bond funds.
- Cliff Asness, AQR Capital Management; Jan Van Eck, Van Eck Associates; and Rick Lake, Lake Partners; who will talk about how advisors can help pick the right alternative investments for their clients.

Senior members of Morningstar's fund research staff will hold a roundtable on June 23 to discuss the current investing environment and highlight areas of opportunity and concern for fund investors. Morningstar's ETF analysts will review the top trends in the rapidly developing ETF market on June 24. Finally, Morningstar's equity research team will give their outlooks for the best opportunities in the equity and credit markets on June 25 .

On Wednesday, June 23, Morningstar will host its third annual Advisor User Forum training session for financial advisors who use Morningstar's software and Web products, including the recently upgraded Advisor Workstation 2.0, Morningstar Office and Principia. The forum gives advisors the chance to ask questions, provide feedback, learn to apply advanced techniques, and get hands-on experience with Morningstar trainers. Chris Boruff, president of Morningstar's software division, will deliver opening remarks at the forum and Pat Dorsey, Morningstar's director of equity research, will give the luncheon keynote speech.