

Morningstar Direct and Enterprise Advisor Software Coverage

Our priority is to mobilize the Morningstar account team that works across this breadth of solutions to help you achieve your 2024 strategic pillars with efficiency.

Business Development

Matt Burki

SVP, Global Business Development

Matthew.Burki@morningstar.com

+1 312 384-4899

Responsible for the overall partnership and strategic engagement between our firms.

Maeve Doonan

SVP, Business Development — Morningstar Advisor Software

Maeve.Doonan@morningstar.com

+1 312 696-6632

Business development for Enterprise Advisor Software.

Support

Enterprise Software Support

+1 877 409-0473

Advisorsupport@morningstar.com

Available 8:00 am–6:00 pm CST Monday–Friday

Direct Support

+1 866 229-0216

MorningstarDirect@morningstar.com

Available 8:00 am–6:00 pm CST Monday–Friday

Customer Success

Troy Martin

Customer Success Manager, Enterprise Software
(Advisor Workstation and Annuity Intelligence)

Troy.Martin@morningstar.com

+1 312 244-8948

Responsible for day-to-day account management, product education and training, optimizing the client experience and escalation contact for Enterprise Advisor Software products.

Advisor Client Experience

Devin Johnson

Client Account Executive, Advisor Client Experience

Devin.Johnson@morningstar.com

[Contact via Calendly](#)

Responsible for scheduling trainings for current users, renewal questions, solution overviews.

Brian Noonan

Business Development Executive, Advisor Client Experience

Brian.Noonan@morningstar.com

[Contact via Calendly](#)

Responsible for Charles Schwab West new user demonstrations, and solution overviews.

Ian Welsh

Business Development Executive, Advisor Client Experience

Ian.Welsh@morningstar.com

[Contact via Calendly](#)

Responsible for Charles Schwab East new user demonstrations, and solution overviews.