

# 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 strategic pillars with efficiency.

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## Business Development

### **Matt Burki**

SVP, Global Business Development

[Matthew.Burki@morningstar.com](mailto:Matthew.Burki@morningstar.com)

+1 312 384-4899

Responsible for overall partnership and strategic engagement.

### **Maeve Doonan**

SVP, Business Development — Morningstar Advisor Software

[Maeve.Doonan@morningstar.com](mailto:Maeve.Doonan@morningstar.com)

+1 312 696-6632

Business development for Enterprise Advisor Software.

### **Maggie Carlson**

VP, Business Development, Morningstar Direct

[Maggie.Carlson@morningstar.com](mailto:Maggie.Carlson@morningstar.com)

+1 312 244-7621

Business development for Morningstar Direct and Reporting.

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## Customer Success

### **Troy Martin**

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

[Troy.Martin@morningstar.com](mailto: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.

### **Benjamin Ho**

Customer Success Manager, Enterprise Software

[Benjamin.Ho@morningstar.com](mailto:Benjamin.Ho@morningstar.com)

+1 312 696-6031

Responsible for day-to-day account management, product education and training, optimizing the client experience and escalation contact for Morningstar Direct.

### **Diana Anghel**

Associate Customer Success Manager, Morningstar Direct

[Diana.Anghel@morningstar.com](mailto:Diana.Anghel@morningstar.com)

+1 312 244-8293

Responsible for day-to-day account management, product education and training, optimizing the client experience and escalation contact for Morningstar Direct.

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## Support

### **Enterprise Software Support**

+1 877 409-0473

[Advisorsupport@morningstar.com](mailto:Advisorsupport@morningstar.com)

Available 8:00 a.m.–6:00 p.m. CST Monday–Friday

### **Direct Support**

+1 866 229-0216

[MorningstarDirect@morningstar.com](mailto:MorningstarDirect@morningstar.com)

Available 8:00 a.m.–6:00 p.m. CST Monday–Friday

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## Advisor Client Experience

### **Devin Johnson**

Client Account Executive, Advisor Client Experience

[Devin.Johnson@morningstar.com](mailto: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](mailto: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.Welsch@morningstar.com](mailto:Ian.Welsch@morningstar.com)

[Contact via Calendly](#)

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