

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.

Business Development

Jean Johnson

SVP, Global Business Development

Jean.Johnson@morningstar.com

+1 312 696-6090

Responsible for overall partnership and strategic engagement.

Maeve Doonan

SVP, Business Development — Morningstar Advisor Software

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

+1 312 244-7621

Business development for Morningstar Direct and Reporting.

Customer Success

Maddie O'Grady

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

Maddie.OGrady@morningstar.com

+1 312 244-8321

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

Francesca Campo

Customer Success Manager, Morningstar Direct

Francesca.Campo@morningstar.com

+1 312 244-7553

Responsible for day-to-day management and education to optimize Morningstar Direct client experience.

Advisor Client Experience

Dylan Flood

Business Development Executive, Advisor Client Experience

Dylan.Flood@morningstar.com

[Contact via Calendly](#)

Responsible for LPL East new user demonstrations, and solution overviews.

Haley Ruch

Client Account Executive, Advisor Client Experience

Haley.Ruch@morningstar.com

[Contact via Calendly](#)

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

Benjamin Meyers

Business Development Executive, Advisor Client Experience

Benjamin.Meyers@morningstar.com

[Contact via Calendly](#)

Responsible for LPL West new user demonstrations, and solution overviews.

Support

Enterprise Software Support

+1 877 409-0473

Advisorsupport@morningstar.com

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

Direct Support

+1 866 229-0216

MorningstarDirect@morningstar.com

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