

# Your Morningstar Account Team

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

### Bryan Yelvington

SVP, Global Business Development

[Bryan.Yelvington@morningstar.com](mailto:Bryan.Yelvington@morningstar.com)

+1 312-696-6580

Responsible for overall partnership and strategic engagement between our firms.

### Joseph Welsch

VP, Business Development, Morningstar Direct

[Joseph.Welsch@morningstar.com](mailto:Joseph.Welsch@morningstar.com)

+1 312-348-3168

Business development for Morningstar Direct and Reporting solutions.

### 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.

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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.

### Charlie Fleming

Business Development Executive, Advisor Client Experience

[Charlie.Fleming@morningstar.com](mailto:Charlie.Fleming@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](mailto:Ian.Welsh@morningstar.com)

[Contact via Calendly](#)

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

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## Customer Success

### Lisa Caler

VP, Account Management

[Lisa.Caler@morningstar.com](mailto:Lisa.Caler@morningstar.com)

+1 312-384-3877

Responsible for enterprise-wide service experience, including account management and coordination across product-specific CSMs.

### Dom Purciarello

Senior Customer Success Manager, Data & Research Products

[Dominic.Purciarello@morningstar.com](mailto:Dominic.Purciarello@morningstar.com)

+1 312 244 7244

Responsible for account management, product training, and escalation contact for data & research.

### Alex Haab

Customer Success Manager, Data & Research Products

[Alex.Haab@morningstar.com](mailto:Alex.Haab@morningstar.com)

Responsible for account management, product training, and escalation contact for data & research.

### Ben Ho

Customer Success Manager, Morningstar Direct

[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.

### Jay Wong

Customer Success Manager, Enterprise Software

(Advisor Workstation and Annuity Intelligence)

[Jay.Wong@morningstar.com](mailto:Jay.Wong@morningstar.com)

+1 312-244-7214

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

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## General Product Support (United States)

### Licensed Data Support

+1 866 608 9567

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

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

### Enterprise Advisor Software Support

+1 877 409 0473

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

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

### Direct Support

+1 866 229 0216

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

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