

# Third Annual Morningstar Stocks Forum

## Day One: Investing in Any Market Climate

Chicago Mart Plaza  
350 West Mart Center Drive  
14th floor  
+1 312 836-5000

April 22, 2008

8:00–9:00 am **Registration and Continental Breakfast** | 14th Floor

9:15–9:30 am **Welcoming Remarks** | Sauganash Grand Ballroom  
Pat Dorsey, Director of Equity Research

9:30–10:30 am **Strategist Session** | Sauganash Grand Ballroom  
Paul Larson, Equity Strategist and Editor of *Morningstar StockInvestor* follows up on his stock picks from 2007 and shares his best new stock ideas for 2008.

10:30–10:50 am **Break**

10:50 am–11:50 am **Break-Out Sessions (Select One)**

**A. Analyst Exhibit Hall** | Wolf Point Ballroom, 15th floor

Stop by our analyst exhibit hall and visit our sector booths to have your stock questions answered.

**B. Fundamental Approach to Options** | Merchants Hotel, 14th floor

Phil Guziec talks about how options strategies tie in with Morningstar's Equity Research and how to use options to boost your returns.

**C. Ultimate Stock Pickers** | Sauganash Grand Ballroom, 14th floor

Justin Fuller explains how to build a market-beating portfolio using the strategies of great fund managers and Morningstar equity research.

12:00–1:00 pm **Lunch with the Analysts** | Sauganash Grand Ballroom

1:00–2:00 pm **Strategist Session** | Sauganash Grand Ballroom  
Toan Tran, Equity Strategist and Editor of *Morningstar GrowthInvestor* follows up on his stock picks from 2007 and shares his best new stock ideas for 2008.

2:10–3:00 pm **Break-Out Sessions (Select One)**

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3:10–4:10 pm

**Strategist Session** | Sauganash Grand Ballroom

Josh Peters, Equity Strategist, Editor of *Morningstar DividendInvestor*, and author of *The Ultimate Dividend Playbook* follows up on his stock picks from 2007 and shares his best new stock ideas for 2008.

4:10–5:00 pm

**Keynote Speaker** | Sauganash Grand Ballroom

Pat Dorsey, Director of Equity Research, delivers the keynote speech on Behavioral Finance.

8:00–5:00 pm

**Morningstar Bookstore** | Mansion House

Shop Morningstar's library of stock, mutual fund, ETF, and personal finance publications. As an added bonus, Josh Peters and Pat Dorsey will be signing a limited supply of their books, *The Ultimate Dividend Playbook* and *The Little Book That Builds Wealth*.

**Business Center** | Columbian House

Stay in touch during the forum with free Wi-Fi access in our private business center.