

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.

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.

Brittany Reed

VP, Business Development, Morningstar Direct

Brittany.Reed@morningstar.com

Business development for Morningstar Direct and Reporting.

Customer Success

Frankie Campo

Customer Success Manager, Morningstar Direct

Francesca.Campo@morningstar.com

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

Maddie O'Grady

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.

Erick Giron Aleman

Customer Success Manager, Data & Research Products

Erick.GironAleman@morningstar.com

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

Advisor Client Experience

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 (LPL West).

Stephanie Callahan

Client Account Executive, Advisor Client Experience

Stephanie.Callahan@morningstar.com

[Contact via Calendly](#)

Responsible for scheduling trainings for current users, renewal questions, solution overviews (LPL East).

Benjamin Meyers

Business Development Executive, Advisor Client Experience

Benjamin.Meyers@morningstar.com

[Contact via Calendly](#)

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

Margaret Blommer

Business Development Executive, Advisor Client Experience

Margaret.Blommer@morningstar.com

[Contact via Calendly](#)

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

Jackson Tanner

Business Development Executive, Advisor Client Experience

Jackson.Tanner@morningstar.com

[Contact via Calendly](#)

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

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General Product Support (United States)

Licensed Data Support

+1 866 608 9567

licensedproducts@morningstar.com

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

Enterprise Advisor 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