

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

Thu Pham

SVP, Global Business Development

Thu.Pham@morningstar.com

+1 312 696-6319

Responsible for overall partnership and strategic engagement.

Derek Sellenraad

VP, Business Development, Data Sales Specialist

Derek.Sellenraad@morningstar.com

+1 312 244-7606

Business development for Morningstar Data.

Thomas Aviles

SVP, Business Development—Morningstar Advisor Software

Thomas.Aviles@morningstar.com

+1 312 244-7279

Business development for Enterprise Advisor Software.

Brittany Reed

VP, Business Development, Morningstar Direct

Brittany.Reed@morningstar.com

+1 872 359-4084

Business development for Morningstar Direct and Reporting.

Customer Success

Ben Ho

Customer Success Manager, Morningstar Direct

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.

Emily Greenspan

Customer Success Manager, Enterprise Software

(Advisor Workstation and Annuity Intelligence)

Emily.Greenspan@morningstar.com

+1 312 244-7200

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

Lorell Pitts

Customer Success Manager, Data & Research Products

Lorell.Pitts@morningstar.com

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

Advisor Client Experience

Karli Paulson

Client Account Executive, Advisor Client Experience

Karli.Paulson@morningstar.com

[Contact via Calendly](#)

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

Harsimranpreet (Simran) Singh

Business Development Executive, Advisor Client Experience

Harsimranpreet.Singh@morningstar.com

[Contact via Calendly](#)

Responsible for new user demonstrations, and solution overviews.

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