2026 Agenda

Wednesday, June 17

8:05 am – 8:50 am	Aon Grand Ballroom	**Geopolitics & Portfolios: What Really Matters for Investors** Join us for an in-depth conversation with Walter Russell Mead, one of the world's leading scholars on foreign affairs. As the Ravenel B. Curry III Distinguished Fellow in Strategy and Statesmanship at the Hudson Institute, professor, and Global View columnist at The Wall Street Journal, Mead brings unparalleled expertise on geopolitics. Mead and Daniel Needham, president of Morningstar Wealth, explore the current macroeconomic outlook. Unpack how global forces directly impact the daily practice of financial advisors with strategic insights on an increasingly complex world.	Daniel Needham, Morningstar	Keynote
8:50 am – 9:00 am	Aon Grand Ballroom	**Kunal Kapoor Keynote** Hear from Morningstar CEO Kunal Kapoor on what matters most for investor success.	Kunal Kapoor, Morningstar	Keynote
9:30 am – 9:55 am	Theater 2	**The Fall of Passive High Yield and the Rise of Active ETF's** In a market shaped by shifting growth, inflation, and policy, the limits of passive credit are increasingly evident—making selectivity in high yield more important than ever. This session will explore the forces driving high-yield performance and why active management is better equipped to capture opportunities while managing risk. We'll spotlight the Principal Active High Yield ETF (YLD) as a real-world example and close with a look at how active ETFs are evolving and their growing role in portfolios. Join Principal Asset Management's CIO and Global Head of Fixed Income, Michael Goosay, and Senior High-Yield Portfolio Manager, Josh Rank, to gain practical insights you can use to position client portfolios more effectively in today's high-yield environment.	Michael Gosay, Principal Josh Rank, Principal	Meet the Manager
9:30 am – 10:20 am	Breakout A	**Is the Dividend Dream Still Alive? Revisiting the Case for Dividend-Focused Investing** Dividend funds have underperformed broad market indexes since 2023, raising questions about their role in portfolios. Is this a cyclical headwind, or is the fundamental case for dividend investing changing? Three portfolio managers with diverse approaches to dividend stocks weigh in on the strategy's future.	Todd Trubey, Morningstar Ramona Persaud, Fidelity Mike Barclay, Columbia Income Andrew Brandon, JP Morgan	Breakout Session

2026 Agenda

Wednesday, June 17

9:30 am – 10:20 am	Breakout B	**Credit Is Calm--Should Investors Be Nervous? (Credit is No Longer Calm - Now What?)** With spreads at historic lows, credit markets appear unusually tranquil. But is this stability a sign of health or a mask for underlying risks? This session interrogates default complacency and hidden leverage across markets to determine if investors should be preparing for volatility.	Max Curtin, Morningstar Ivor Schucking, Vanguard Pramod Atluri, Capital Group Ryan Brist, Franklin Templeton	Breakout Session
9:30 am – 10:10 am	Morningstar Theater	**Peer to Pier: Direct Advisory Suite Success** Join three experienced Direct Advisory Suite users for a dynamic discussion on how they leverage the platform to empower their clients to make more informed investment decisions. We'll explore what success in Direct Advisory Suite looks like from their perspective, highlight real client success stories, and uncover the tools and strategies that enhance their day-to-day workflows. Stay with us after the discussion for a live demonstration of their favorite workflows in action.	Kyle Lalonde, Morningstar	Morningstar Solutions & Insights
9:30 – 10:00am	Podcast Studio	**Wealth Management Invest** Welcome to the Wealth Management Invest Podcast. David Bodamer delves into the strategic insights of financial advisors and Chief Investment Officers (CIOs) from leading RIAs, including the increasing adoption of alternative investments to enhance the conventional 60/40 portfolio. Episodes showcase engaging discussions with top asset managers, shedding light on the ever-evolving landscape of private investment offerings, cutting-edge technology, and the latest developments in traditional ETFs and SMAs.	David Bodamer, Wealth Management Brian Moriarty, Morningstar	Podcast

2026 Agenda

Wednesday, June 17

10:05 am – 10:30 am	Theater 2	**Blue Owl - Building Durable Income: Net Lease & Digital Infrastructure in Private Wealth** In a market environment shaped by evolving economic conditions, technological change, and shifting capital flows, investors are increasingly focused on the role that different asset classes play within a broader portfolio. In this session, Gary Rozier, Senior Managing Director in Blue Owl's Real Assets platform, will discuss how investors can think about selected real asset exposures, specifically net lease real estate and digital infrastructure, through a portfolio construction lens. The discussion will explore how these sectors have evolved over time, what has remained consistent in how they are underwritten, and how they fit within a diversified allocation. It will also touch on how investors are evaluating opportunities across a range of markets, as well as the influence of longer-term structural trends, including the growing importance of digital infrastructure in the economy.	Gary Rozier, Blue Owl	Meet the Manager
10:10 am – 10:35 am	Morningstar Theater	**Peer to Pier: Next Steps in Action with Direct Advisory Suite** Building on insights from the Peer to Pier panel, this session showcases Direct Advisory Suit in action. Watch a live demo highlighting tools like Research, Portfolio Management, and Investment Proposal generation. Plus, get an exclusive look at the latest innovations powered by the AI Assistant.	Kyle Lalonde, Morningstar	Morningstar Solutions & Insights
10:10 am – 10:40 am	Podcast Studio	**PracticeLab™: From Growth to Greatness: What top advisors do differently** Learn what Capital Group's 6th Edition of Pathways to Growth research reveals about how leading advisors grow with intention — including the importance of leadership, thoughtful use of AI and a disciplined approach to building defined contribution retirement businesses. Listeners will walk away with research-backed, field-tested strategies to strengthen leadership, scale your practice and build a more durable retirement business.	Shaun Tucker, Capital Group Mike Van Wyk, Capital Group Jonathan Wilson, Capital Group	Sponsored Podcast

2026 Agenda

Wednesday, June 17

10:30 am – 11:20 am	Breakout A	**Global Bonds and Emerging Markets Debt: Do They Deserve a Permanent Seat at the Allocation Table?** Emerging market bonds surged in 2025 but now trade at tighter levels despite a complex geopolitical environment. Amid a changing global order and a weakening USD, this panel discusses fixed income opportunities outside the US. Determine what categories warrant a permanent allocation in diversified portfolios.	Saraja Samant, Morningstar Samy Muaddi, T Rowe Price Anujeet Sareen, Franklin Templeton Shamaila Khan, UBS	Breakout Session
10:30 am – 11:20 am	Breakout B	**Moats and Monetization in AI** ChatGPT, Claude, and Gemini have demonstrated impressive capabilities--but no single model has maintained a clear lead for long, and none have established a monetization strategy that delivers consistent profitability. The question remains: Will any of these models build a genuine economic moat and generate sustainable profits, or will foundational models ultimately become commodities?	Malik Ahmed Khan, Morningstar	Breakout Session
10:30 am – 11:20 am	Theater 1	**Beyond Returns: Integrating Values and Faith Based Mandates into Investment Strategy** Evolving investor expectations require wealth managers to deliver portfolios that align with clients' personal beliefs and ethical priorities. This session explores how value-based investing is transforming into a scalable, data-driven component of modern wealth management. Walk away with emerging approaches from industry experts to personalize portfolios and integrate faith-aligned frameworks into your practice.	Claire Cusack, Morningstar Rob Edwards, Morningstar David S. Friedman, Bountiful Financial LLC Mark Bateman, Ph. D., Aperio by Blackrock David Hanna, Knights of Columbus Asset Advisors	Industry Perspectives
10:40 am – 11:05 am	Theater 2	**Baird Funds - Life, Liberty and the Pursuit of Liquidity** Warren Pierson, Co-CIO, and Lyle Fitterer, Co-Head of Municipals, discuss the bond market, the importance of liquidity, and opportunities for income and relative value in the Treasury, securitized, corporate, and municipal sectors.	Warren Pierson, Baird Funds Lyle Fitterer, Baird Funds	Meet the Manager

2026 Agenda

Wednesday, June 17

10:40 am – 11:40 am	Morningstar Theater	**From Insight to Action: Leveraging Investor Perspectives in 2026** Discover 2026 insights and trends for advisors from the perspectives of investors surveyed in the latest Morningstar Investor Perspectives survey. Explore evolving investor behaviors, the growing role of trust and emotional value, and how financial advisors can bridge knowledge gaps in areas like private markets and AI adoption. Advisors will gain actionable strategies to help clients stay confident, focused, and committed to their long-term financial goals.	Thomas Aviles, Morningstar Joe Agostinelli, Morningstar	Morningstar Solutions & Insights
10:50 am – 11:20 am	Podcast Studio	**This Week In Wealth Podcast** 'This Week in Wealth' is Citywire's weekly podcast that breaks down the biggest stories in the US wealth management industry and what they mean for advisors. Citywire USA editor-in-chief Alex Steger and Citywire RIA editor Ian Wenik are joined by a rotating cast of Citywire journalists and notable industry names.	Kunal Kapoor, Morningstar Alex Steger, Citywire Ian Wenik, Citywire	Podcast
11:15 am – 11:40 am	Theater 2	**Gabelli - Finding Catalyst Driven Opportunities with Cyclical and Secular Tailwinds** Co-CIO, Value, Kevin Dreyer, will explore investment opportunities in key sectors with tailwinds, including Aerospace and Defense, Sports and Live Entertainment and Critical Infrastructure, and how financial engineering and M&A can surface value independent of the market's direction.	Kevin Dreyer, Gabelli	Meet the Manager

Exhibit Hall Closes for Lunch 11:45 – 1:00pm

1:15 pm – 2:05 pm	Breakout A	**Private Markets, Public Scrutiny: Meet the Managers Bringing Private Markets to Main Street** We put the leading asset managers bringing private markets to individual investors on the hot seat. This session dissects the opportunities and challenges of integrating private market strategies into portfolios. Unpack liquidity concerns, valuation questions, and the potential for enhanced returns.	Jason Kephart, Morningstar Ankul Daga, Vanguard Nick Nefouse, BlackRock Alexandra Wilson-Elizondo, Goldman Sachs	Breakout Session

2026 Agenda

Wednesday, June 17

1:15 pm – 2:05 pm	Breakout B	**The Mega IPO Pipeline** SpaceX, Anthropic, and OpenAI's upcoming IPOs highlight the growth missed by waiting for companies to go public. Learn about the expanding access points to VC-backed companies and how venture exposure should factor into your portfolio.	Paul Condra, PitchBook Kyle Stanford, PitchBook James Ulan, PitchBook	Breakout Session
1:15 pm – 2:15 pm	Theater 1	**Wealthtech Showcase** Fintechs to Watch - Showcase of seven emerging fintechs redefining advice and reshaping the wealth experience. They will compete for Best in Show, with lunch with Kunal Kapoor, Morningstar's CEO, as the grand prize.	Nate Hartauer, Fintech Alliances Toby Wade, DeepVest Ilyas Zakiat, BIASafe AI Florian Kohler, AltQ AJ O'Hara, Abacus Sindhu Joseph, CogniCor Cameron Howe, Investipal Jack Babbush, Centana Growth Partners - Judge Linda Bready , CleverX Consulting - Judge Rahul Baig, Wells Fargo-Judge	Industry Perspectives
1:15 pm – 2:05 pm	Theater 2	**Practice Management Session: Capital Group - How Advisors can use AI as a growth Driver in 2026** This session explores how financial advisors can use AI to drive growth by improving efficiency, enhancing client experiences and automating high-impact workflows within firm and regulatory guardrails. Participants will gain a practical framework for where AI adds value today, how it is evolving, and how to pair AI capabilities with uniquely human skills to build a future-ready practice.	Brock Sutton, Capital Group	Sponsor Session

2026 Agenda

Wednesday, June 17

1:15 pm – 1:45 pm	Podcast Studio	**Off The Desk: The State of Fixed Income from Those Closest to the Market** Go inside the investment room with Principal Asset Management in this candid, Q&A style conversation featuring CIO and Global Head of Fixed Income Michael Goosay and Senior High Yield Portfolio Manager Josh Rank. Together, they break down the macro signals that truly matter, how those insights shape views on credit and high yield today, and what it means for investors navigating a shifting market. More than commentary, this is a rare, behind-the-scenes look at how real portfolio decisions are debated, tested, and executed—straight from the leaders making them in real time.	Michael Goosay, Principal Asset Management Josh Rank, Principal Asset Management	Sponsored Podcast
1:55 pm – 2:40 pm	Morningstar Theater	**Meet Morningstar's AI in Direct Advisory Suite. Independent insight. Amplified expertise.** Financial advice is entering an AI-native era—one where leading is defined by the quality, independence, and transparency of the data behind the technology you use. We're proud to introduce the AI Assistant in Direct Advisory Suite - built to bring independent intelligence directly into the advisor workflow and power the expertise that sets your advice apart, and empowers your clients' success.	Thomas Aviles, Morningstar	Morningstar Solutions & Insights
1:55 pm – 2:25 pm	Podcast Studio	**The Long View** Will Danoff has been one of the most successful active managers in history during his more than 35-year tenure at Fidelity Contrafund. In this exclusive conversation prior to his retirement, he'll reflect on the importance of curiosity, how he manages his research process and information flow, the impact of artificial intelligence, how he's mentoring younger managers and analysts, what makes Fidelity's research culture unique, and more.	Ben Johnson, Morningstar Amy Arnott, Morningstar Will Danoff, Fidelity	Podcast
2:20 – 3:05 pm	Theater 1	**Turning Intelligence Into Investor Advantage: How Leading Wealth Platforms Are Building With Data, Trust, and AI** Hear how established Morningstar partners are turning data, intelligence, and AI into real client outcomes, and what they have learned as they move from idea to execution, with practical takeaways for wealth leaders.	Anthony Termini, Morningstar Rachel Lawrence, Monarch Amit Miglani, Altruist John Milne, Black Diamond Tony Mackenzie, Jacobi Strategies	Fintech

2026 Agenda

Wednesday, June 17

2:15 pm – 3:05 pm	Breakout A	**Taking the US Economy's Pulse** What is driving the U.S. economy today and what risks and opportunities lie ahead? This panel analyzes the current drivers of the US economy, providing a forward-looking outlook on growth, inflation, labor markets, Fed policy and interest rates. They highlight forces shaping the macroeconomic landscape, from AI disruption to rising geopolitical tensions, and translate these macro trends into investment implications across global assets and currencies, laying out key scenarios and how investors can prepare for an uncertain, fast-changing landscape.	Preston Caldwell, Morningstar Hong Cheng, Morningstar Dominic Pappalardo, Morningstar	Breakout Session
2:15 pm – 3:05 pm	Breakout B	**Liquid Alternatives: The Asset Class You Hate Until You Need It** Liquid alternatives often frustrate investors in bull markets but prove invaluable during market stress. This panel examines the psychological and structural challenges of these diversifying strategies. See how advisors can manage client expectations to drive better long-term outcomes.	David Reyna, Morningstar Catherine LeGraw, GMO Ranjan Bhaduri, Bodhi Research Group Brian Portnoy, Shaping Wealth	Breakout Session
2:15 pm – 3:05 pm	Theater 2	**Capital Group - Fireside Chat: Leadership Lessons for A High Performing Advisory Practice** Join us for a candid fireside chat on leading a high performing advisory practice, featuring leadership perspectives from Capital Group practice management consultants and a former Navy SEAL. Through stories and practical insights, this session connects elite leadership principles to everyday realities, enabling you to build strong teams, drive performance and cultivate a culture of growth and excellence.	Shaun Tucker, Capital Group Jon Wainman, Capital Group Jonathan Wilson, Capital Group	Sponsored Session
2:35 pm – 3:05 pm	Podcast Studio	**The Morning Filter** Join us for the taping of a bonus episode of The Morning Filter podcast. Co-host Susan Dziubinski sits down with Morningstar analysts to discuss current market trends and how to invest to take advantage of them. Exhibit Hall Closes for the Day at 3:05 pm	Susan Dziubinski, Morningstar William Kerwin, Morningstar	Podcast

Exhibit Hall Closes for the Day at 3:05 pm

2026 Agenda

Wednesday, June 17

3:30 pm – 4:05 pm	Aon Grand Ballroom	**Perspectives on Active Management: Will Danoff** Join influential Fidelity Contrafund portfolio manager Will Danoff for a candid discussion on his 35 years in active management. Danoff, known for his growth-oriented strategy, reflects on the professional journey that shaped his philosophy. He reveals his outlook on the future of stock picking.	Robby Greengold, Morningstar Will Danoff, Fidelity	Keynote
4:05 pm – 4:35 pm	Aon Grand Ballroom	**Private Credit vs. Public Credit: Competing or Complementary?** Private and public credit differ dramatically in transparency, liquidity, and return expectations, often confusing investors about their roles in a portfolio. This session explores the key distinctions between the two, assesses suitability for different investor types, and clarifies if they are competitors or complementary assets.	Brian Moriarty, Morningstar Brad Marshall, Blackstone Caitlin Nemeth, Cliffwater Sonali Pier, PIMCO	Keynote
4:35 pm – 5:15 pm	Aon Grand Ballroom	**The Power of Human Connection: Designing a Practice Built on Unreasonable Hospitality** As a financial advisor, you are in the business of serving other people. Serving efficiently is no longer enough--now, it's how you make the people you work with and those you serve feel that matters most of all. Will Guidara shares why he believes our world is on the precipice of becoming a hospitality economy, and how every advisor can choose to be in the business of hospitality by transforming ordinary interactions into extraordinary experiences.	Will Guidara, Unreasonable Hospitality	Keynote

2026 Agenda

Thursday, June 18

8:05 am – 8:35 am	Aon Grand Ballroom	**Mastering the Language of Public and Private Markets** The boundaries between public and private sectors are blurring, reshaping modern portfolio construction. In this fireside chat, Morningstar CEO Kunal Kapoor and Blackstone COO Jon Gray provide a roadmap for this new terrain. Break down the rapidly evolving world of private markets and the strategic shifts impacting investors today.	Kunal Kapoor, Morningstar Jon Gray, Blackstone	Keynote
8:35 am – 9:05 am	Aon Grand Ballroom	**Troubleshooting the 4 Biggest Shocks to Retirement Plans** Sequence of returns, inflation, long-term care costs, and unexpected early retirement pose serious risks to today's retirees. This session unites Benz's expertise in personal finance education, Anspach's on-the-ground experience building retirement income plans, and Finke's academic rigor in behavioral finance and wealth management. Discover practical strategies that help safeguard client portfolios and navigate complex planning decisions with confidence.	Christine Benz, Morningstar Dana Anspach, Sensible Money Michael Finke, The American College of Financial Services	Keynote
9:30 am – 10:20 am	Breakout A	**What Scares Manager Research Analysts?** Our panel of Morningstar manager research leaders share the red flags that make them pause, probe further, or rule out a fund entirely--and how advisors can use these practical insights to identify risks during the due diligence process.	Jeff Ptak, Morningstar Andrew Daniels, Morningstar Eric Jacobson, Morningstar Elizabeth Foos, Morningstar	Breakout Session
9:30 am – 10:20 am	Breakout B	**Building Portfolios for Income: Investing in Wide Moat Dividend Stocks** Discover how dividend-paying stocks with wide economic moats can strengthen income-focused portfolios. This panel provides strategies for identifying companies with durable competitive advantages and attractive dividend yields--helping you build resilient, income-generating portfolios for your clients.	Damien Conover, Morningstar Travis Miller, Morningstar Karen Andersen, Morningstar Erin Lash, Morningstar	Breakout Session

2026 Agenda

Thursday, June 18

9:30 am – 10:20 am	Theater 1	**Do Stocks Outperform Cash? 100 Years of US Equity Market History to Inform Today's Investment Decisions** From the roaring twenties to the present day, a century of US equity market history offers invaluable insights for investors. Experts from Morningstar Indexes and the academic community examine historical market trends through the lens of the CRSP Research database. Topics covered in this interactive session will include market concentration, public-to-private convergence, and initial public offerings.	Dan Lefkovitz, Morningstar Hendrik (Hank) Bessembinder, Arizona State University Alex Poukchanski, Morningstar	Industry Perspectives
9:30 am – 10:00 am	Morningstar Theater	**Revolutionizing the Advisory Experience: Interactive Tools in Direct Advisory Suite** Redefine your advisory approach with a live walkthrough of Direct Advisory Suite. Discover how interactive tools like the Client Dashboard, AI-generated talking points, and the new Interactive Web Report empower you to deliver deeper portfolio insights. Plus, see the dynamic Portfolio Compare Tool in action, showcasing its powerful analysis and reporting capabilities.	Dominique Jackson, Morningstar	Morningstar Solutions & Insights
9:30 – 10:00 am	Podcast Studio	**Simple, But Not Easy** As private-market strategies become more widely available, financial advisors and their clients are gaining new tools to incorporate into portfolios. We'll discuss what's driving this shift, the opportunities and risks associated with private markets, and how advisors can help clients navigate this evolving landscape. Most importantly, we'll explore how these strategies can potentially enhance diversification – rather than lead to "diversification."	Daniel Noonan, Morningstar Lucy Xin, Apollo Global Management	Podcast
9:30 am – 9:55 am	Theater 2	**Hamilton Lane - Building Blocks: Evergreen Portfolio Construction** This session will explore how evergreen funds are reshaping private market investing and why advisors are increasingly adopting them. We'll debunk common myths around their return potential versus public markets and overall fee structures and look ahead to what's next - including integration into 401ks and model portfolios, and the potential for tokenization and blockchain to expand and simplify access to private markets	Jackie Rantanen, Evergreen Portfolio Solutions	Meet the Manager

2026 Agenda

Thursday, June 18

10:05 am – 10:30 am	Theater 2	**Meet the Manager: Potomac - Conquer Risk. Don't Just Manage It.** Discover how a tactical approach to investing, rooted in data, discipline, and transparency, may lead to more consistent investment outcomes and a differentiated investing experience. This session explores risk-managed strategies that prioritize downside protection without sacrificing growth, giving advisors practical tools to navigate volatile markets with confidence.	Dan Russo, Potomac	Meet the Manager
10:10 am – 10:40 am	Morningstar Theater	**AI Assistant: Enhancing Performance Reviews with Direct Advisory Suite** Discover how the AI Assistant in Direct Advisory Suite transforms client reviews into seamless, story-driven experiences. Through a live walkthrough, see how a single chat generates portfolio insights, comparison reports, and meeting-ready prompts—from holdings details to tailored talking points. Gain clarity, speed, and confidence to elevate every client conversation.	Dominique Jackson, Morningstar	Morningstar Solutions & Insights
10:10 am – 10:40 am	Podcast Studio	**Investing Insights** Are Mutual Funds Becoming Obsolete? The original vehicle for retail investors is under attack from ETFs and CITs.	Ivanna Hampton, Morningstar Bryan Armour, Morningstar Daniel Sotiroff, Morningstar	Podcast
10:30 am – 11:20 am	Breakout A	**Global Investing for a New World Order** Amid political and economic shockwaves from Washington, how are global equity portfolio managers adapting? A panel of three distinguished managers offer their strategies for navigating a volatile equity market and parsing the current landscape.	Adam Sabban, Morningstar Helge Skibeli, JP Morgan Carl Kawaja, Capital Group Conor Muldoon, Causeway Capital Management	Breakout Session
10:30 am – 11:20 am	Breakout B	**How to Use Semiliquid Funds in Your Portfolio** Discover the best practices for incorporating semiliquid funds into investment strategies. This discussion evaluates their merits against traditional asset classes to determine their true efficacy as a portfolio diversifier.	Kimberly Hart, Morningstar Chris Tate, Morningstar Brian Moriarty, Morningstar Jack Shannon, Morningstar	Breakout Session

2026 Agenda

Thursday, June 18

10:30 am – 11:20 am	Theater 1	**Mid-Year Outlook** Leaders from Morningstar's Chief Investment Office discuss the best investment ideas across global equity and fixed income markets. Get insights on how to position client portfolios to capture the strongest opportunities in the current market environment.	Paul Tait, Morningstar Phillip Straehl, Morningstar Dominic Pappalardo, Morningstar Ricky Williamson, Morningstar	
10:40 am – 11:05 am	Theater 2	**Gabelli - From Promise to Proof: AI Enters its Commercial Era** John Belton, Managing Director, Growth Equities, will pick up where he left off at last year's Morningstar conference presentation with an update on the AI industry, an analysis of financial returns on AI capex outlays, and a look ahead at emerging use cases and what comes next for the world's most important technology.	John Belton, Gabelli	Meet the Manager
10:50 am – 11:20 am	Morningstar Theater	**A(I) Day in the Life: Practical AI moments that improve advice and client outcomes** Move beyond hype and see practical, relatable moments where AI assistance supports better outcomes for advisors and their clients. We'll walk through how AI can enhance client relationships, streamline workflows, and elevate decision-making--without losing the human touch that defines great advice.	Phil Nagel, Morningstar	Morningstar Solutions & Insights
11:15 am – 11:40 am	Theater 2	**Blackstone - Beyond Public Markets: Allocating to Private Market Strategies** In this session, John Bogosian, Managing Director, Blackstone Private Wealth, will cover the fundamentals of private markets and discuss the role private assets can play in portfolios.	John Bogosian, Blackstone	Meet the Manager

Exhibit Hall Closes for Lunch 11:45 am – 1:30 pm

2026 Agenda

Thursday, June 18

1:00 pm – 1:30 pm	Aon Grand Ballroom	**Five Decades in the Markets: Lessons from David Booth** Join David Booth, a pioneer of index and factor investing, for a candid conversation on what five decades in markets have taught him. In this closing session, Booth reflects on the industry's biggest shifts, how Dimensional Fund Advisors—the asset management firm he founded—has adapted through market cycles, and why uncertainty can benefit long-term investors. Expect grounded insights from a leader who helped shape modern investing.	Bridget Hughes, Morningstar David Booth, Dimensional Fund Advisors	Keynote
1:45 pm – 2:35 pm	Breakout A	**Beneath the Behemoths: The Challenges and Opportunities in Small and Mid-Cap Stocks** From flying cars to new-age tech hardware, niche themes have pushed small- and mid-cap indexes to historic levels. Three accomplished portfolio managers offer their opinions on concentrated benchmarks, if it still pays to invest in quality stocks, and whether small- and mid-caps will finally get their day in the sun.	David Carey, Morningstar Miles Lewis, Franklin Templeton Mike Valentine, Wasatch Core Growth Scott Brayman, Champlain Investment Partners	Breakout Session
1:45 pm – 2:35 pm	Breakout B	**Behavioral Techniques to Support Clients in Uncertain Markets** New research reveals how advisors can better support clients when markets feel unpredictable. This session outlines a practical process that combines what clients want with effective coaching techniques. Walk away with tools to communicate amid uncertainty, build client engagement, and keep clients focused on their long-term goals.	Samantha Lamas, Morningstar Danielle Labotka, Morningstar	Breakout Session
1:45 pm – 2:35 pm	Theater 1	**AI in 2026: Winners, Losers, and Investment Strategies** AI remains a dominant investment theme in 2026, with infrastructure spending set to rise by 60% to over half a trillion dollars. Kenneth Lamont explores how AI is reshaping industries, identify key beneficiaries, and shares effective strategies for investing in equities and funds during this transformative era.	Kenneth Lamont, Morningstar	Industry Perspectives

2026 Agenda

Thursday, June 18

1:45 pm – 2:35 pm	Theater 2	**Practice Management Session: Capital Group - The Growth Blueprint: What Top DC Specialists Do Differently** Capital Group and Broadridge partnered to bring you the most comprehensive DC benchmarking study of its kind. This session takes you inside what the best DC specialists do to achieve success, including team structure and operations, client service models, participant engagement and wealth integration. You'll leave with practical, real-world ideas to help grow your DC business, win more plans, deepen participant relationships and turn those connections into long-term wealth opportunities.	Mike Van Wyk, Capital Group Jon Wainman, Capital Group	Industry Perspectives
1:45 pm – 2:10 pm	Morningstar Theater	**Beyond the AI Hype: What Financial Services Firms Need to Know Now** AI adoption in financial services is accelerating, and that means new challenges are popping up every day. From endless proofs of concept and hallucinated responses to outputs that are inconsistent across models, meaningful AI deployment is far more complex than experimenting with a chatbot. This session will explore what typical AI conversations miss: the rising risks in our evolving AI landscape, what firms are actually experiencing as they test AI, and why the quality and structure of data inputs matter just as much as the model generating the output. Whether you're experimenting with generative AI or taking further steps to responsibly bring AI into your workflows, this session will provide practical insights into what works, what doesn't, and what financial services firms should be thinking about next.	Isabella Pradhan, Morningstar	Morningstar Theater
2:45 pm – 3:35 pm	Breakout A	**Ancient, Physical, and Digital: Three Very Different Paths to Diversification** Gold, commodities, and crypto are often grouped together, yet their market drivers differ significantly. This panel breaks down the economic forces behind each, how they interact with equities and bonds, and what advisors should consider before allocating client capital.	Stephen Margaria, Morningstar Greg Sharenow, PIMCO Michele Freed, BlackRock Juan Leon, Bitwise	Breakout Session

2026 Agenda

Thursday, June 18

2:45 pm – 3:35 pm	Breakout B	**The ETF Takeover: Navigating the Shift From Mutual Funds** Mutual funds are increasingly migrating toward ETFs through conversions, share classes, and new stand-alone structures. Explore the distinct advantages and disadvantages of each approach while uncovering the critical implications for advisors and investors during this transition.	Zachary Evens, Morningstar Bryan Armour, Morningstar Daniel Sotiroff, Morningstar	Breakout Session
2:45pm – 3:35 pm	Theater 2	**Invesco - Separating Signal from Noise: ETF Flows, Index Stewardship & Derivative-Income ETFs** ETFs are evolving fast. This session cuts through the headlines with "facts-behind-the-flows" view of what's driving industry trends, and where investors are seeing real opportunity versus noise. We'll highlight Invesco's leadership across core ETF building blocks – QQQ, factors, commodities, fixed income – along with industry-leading experience educating the market on active ETFs. We'll share timely perspective on QQQ and Nasdaq index stewardship, and what it takes to manage and scale index-linked exposures through changing market environments. Finally, we'll deep dive into the derivative-income ETF landscape and Invesco Income Advantage ETFs – how to define the peer group, what "good" looks like in product mechanics, and a clear feature-by-feature framework for evaluating products across the Morningstar derivative-income category.	Brian Hartigan, Invesco John Burrello, Invesco	Sponsored Session