

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

Chris Meek

SVP, Business Development

Chris.Meek@morningstar.com

Responsible for overall partnership and strategic engagement between our firms.

Joseph Welsch

VP, Business Development, Morningstar Direct

Joseph.Welsch@morningstar.com

+1 312-348-3168

Business development for Morningstar Direct and Reporting solutions.

Mike Desciscio

VP, Business Development—Morningstar Advisor Software

Michael.Desciscio@morningstar.com

+1 917-438-1476

Business development for Enterprise Advisor Software.

Derek Sellenraad

VP, Business Development, Licensed Data

Derek.Sellenraad@morningstar.com

+1 312-244-7606

Business development for Morningstar licensed data solutions.

Doug Erickson

Senior Key Account Manager, PitchBook

Douglas.Erickson@pitchbook.com

+1 206-452-7116

Business Development for PitchBook solutions.

Emily Martin

Sales Director, Advertising

Emily.Martin@morningstar.com

+1 312-244-7412

Business development for advertising sales and sponsorships.

Ben Clemons

Director of Business Development, Morningstar Indexes

Ben.Clemons@morningstar.com

+1 312-244-8971

Business development for Morningstar Index data solutions.

Joe Pendergast

SVP, Business Development, Morningstar Indexes

Joseph.Pendergast@morningstar.com

Business Development for Morningstar Index solutions for investible products.

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

Indexes Support

+ 1 312-384-3735

Indexes@morningstar.com

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

PitchBook Support

+ 1 206-257-7775

Support@pitchbook.com

Available 24 hours Monday—Friday

(Support Line Opens 9am Hong Kong time on Mondays and closes 6pm PST on Fridays)

Sustainalytics Support

+1 312-244-7770

Sustainalytics.client.support@morningstar.com

Available 8:30 am–5:30 pm CST Monday—Friday.

Support for the Global Access and Sustainalytics Data Feed products.

For help with ESG delivered through another product, please contact that product's support team.

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Customer Success

Lisa Caler

VP, Account Management

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

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+1 312-244-7244

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

Alex Haab

Customer Success Manager, Data & Research Products

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

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.

Hannah Hummel

Associate Customer Success Manager, Morningstar Direct

Hannah.Hummel@morningstar.com

+1 312-244-8998

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

+1 312-244-7214

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

Andrew Peck

Senior Customer Success Manager, Morningstar Publishing System

Andrew.Peck@morningstar.com

+1 312-244-8966

Responsible for product training and optimizing user experience across our Morningstar Publishing Services platform (factsheet creation).

Amit Patel

Senior Customer Success Manager, PitchBook

Amit.Patel@morningstar.com

+1 646-582-9923

Responsible for product training and optimizing user experience across our Pitchbook platform.

Advisor Client Experience

Maggie Guidici

Client Account Executive, Direct Advisory Suite

Margaret.Guidici@morningstar.com

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