

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

Bryan Yelvington

SVP, Global Business Development

Bryan.Yelvington@morningstar.com

+1 312-696-6580

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.

Maeve Doonan

SVP, Business Development—Morningstar Advisor Software

Maeve.Doonan@morningstar.com

+1 312 696-6632

Business development for Enterprise Advisor Software.

Advisor Client Experience

Devin Johnson

Client Account Executive, Advisor Client Experience

Devin.Johnson@morningstar.com

[Contact via Calendly](#)

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

Charlie Fleming

Business Development Executive, Advisor Client Experience

Charlie.Fleming@morningstar.com

[Contact via Calendly](#)

Responsible for Charles Schwab West new user demonstrations, and solution overviews.

Ian Welsh

Business Development Executive, Advisor Client Experience

Ian.Welsh@morningstar.com

[Contact via Calendly](#)

Responsible for Charles Schwab East new user demonstrations, and solution overviews.

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

Dominic.Purciarello@morningstar.com

+1 312 244 7244

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

Alex Haab

Customer Success Manager, Data & Research Products

Alex.Haab@morningstar.com

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

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.

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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