

Morningstar Direct and Enterprise Advisor Software Coverage

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

Elise Isaacson

SVP, Global Business Development

Elise.Isaacson@morningstar.com

+1 312-384-4864

Responsible for overall partnership and strategic engagement.

Thomas Aviles

SVP, Business Development—Morningstar Advisor Software

Thomas.Aviles@morningstar.com

+1 312 244-7279

Business development for Enterprise Advisor Software.

Saloni Raul

VP, Business Development, Morningstar Direct

Saloni.Raul@morningstar.com

+1 312-244-7982

Business development for Morningstar Direct and Reporting.

Advisor Client Experience

Dom Haubner

Business Development Executive, Advisor Client Experience

Dominick.Haubner@morningstar.com

[Contact via Calendly](#)

Responsible for new user demonstrations, and solution overviews.

Todd Brais

Client Account Executive, Advisor Client Experience

Todd.Brais@morningstar.com

[Contact via Calendly](#)

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

Customer Success

Austin Parks

Customer Success Manager, Enterprise

Software (Advisor Workstation and Annuity

Intelligence) Austin.Parks@morningstar.com

+1 312 244-7095

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

Matthew Guido

Customer Success Manager, Direct Software

Matthew.Guido@morningstar.com

+1 312 244-8914

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

Support

Enterprise Software Support

+1 877 409-0473

Advisorsupport@morningstar.com

Available 8:00 a.m.–6:00 p.m. CST Monday–Friday

Direct Support

+1 866 229-0216

MorningstarDirect@morningstar.com

Available 8:00 a.m.–6:00 p.m. CST Monday–Friday