<FIRST NAME> and <PARTNER FIRST NAME>

Thank you for your time on <DAY>, it was great to see you again!

Thank you for your time on <DAY>, it was nice to meet you!

As you would recall, I mentioned our firm’s decision to partner with Morningstar to help support the investment solutions we provide.

Morningstar are a trusted name and leading provider of independent research, with operations in more than 25 countries. They manage and advise on billions of dollars worldwide for investors, institutions and pension funds.

I thought you might be interested in learning more about Morningstar and why we chose to partner with them:

<CHOOSE SOME OR ALL OF THE BELOW>

* [A 2 minute video on Morningstar](https://www.youtube.com/watch?v=c1aDHhCdfIQ)
* [A short presentation on Morningstar and their investment approach](http://www.morningstarinvestments.com.au/tools/capabilities-deck)
* [A framework for rational investing, to help investors avoid making emotionally driven investment decisions – “Morningstar’s 7 Key Investment Principles](http://www.morningstarinvestments.com.au/investment-principles)”

I look forward to speaking with you soon, but if you have any questions in the meantime, please don’t hesitate to get in touch with me.

Best regards,

<NAME & SIGNATURE>