Morningstar Investment Conference United States
Privacy Notice

Updated: June 30, 2020

This privacy notice is for Morningstar Investment Conference United States (MICUS) attendees. It sets out how we use personal data and gives you information about how to exercise your legal rights. In this statement, we refer to attendees or data subjects as “you,” and Morningstar as “we.”

What personal data do we collect and process? In connection with MICUS, will collect:

- Personal identifiers, including your name and financial account data.
- Professional and employment-related data.
- Internet activity, including your IP address.
- Audio and visual data.

How will we use your data? Depending on your choices, we will use your data to:

- Verify your identity.
- Enable you to attend and participate in conference events.
- Process payment for the conference.
- Send you conference materials.
- Contact you to discuss being a social media ambassador.
- Send you information about Morningstar products.
- Send you information about MICUS sponsor products.
- Respond to your questions or provide you support.

What legal basis do we have to use your data?

- **Consent.** We will only use your data to send you materials, contact you regarding social media participation, or send you Morningstar or sponsor advertising materials if we have your specific consent to do so. If you have given us consent for any of these purposes, you may withdraw your consent by contacting us.
- **Performance of a contract.** When you register for MICUS, we will need to process your data in order to enable you to attend and/or view the conference and to supply you with the conference materials.
- **Legitimate interests.** We may process your data to maintain and monitor web-based services.

Who will we share your personal data with?

- Cvent Payment Services, who will provide payment and registration services.
- Intrado, who manage the platform hosting the MICUS event.
- Mesmerise Global Limited, who will provide audio-visual tools related to the event.
- If you choose to receive sponsor communications, we will share your contact information with MICUS sponsors.
Will we share your data with organizations in other countries? We may process your information in the United States, European Union, or United Kingdom. We will only store or process your information in a manner consistent with the laws of those jurisdictions, including the GDPR and EU-US Privacy Shield.

Will we sell you data? We will not sell your data.

How long will we keep your data? We will only keep your data for as long as necessary or useful for the purposes it was collected for. You may withdraw your consent for us to use your data, request access to your data, or request that we correct, erase, or restrict our use of your data, by clicking here.

Morningstar Privacy Policies. For more information about how Morningstar’s privacy practices and your rights regarding your data, please visit our privacy policies:

- United States
- European Economic Area/United Kingdom
- India
- Australia and New Zealand