



# CONFERENCE

APRIL  
25-27

20 X 18

SAN DIEGO  
CALIFORNIA

HILTON SAN DIEGO BAYFRONT

**David Blanchett, PhD, CFA, CFP®**

Head of Retirement Research

Morningstar Investment Management LLC



David Blanchett, PhD, CFA, CFP® is head of retirement research for Morningstar Investment Management LLC. In this role, he works to enhance the group's consulting and investment services and serves as the chair of the Advice Methodologies and Automated Strategies subcommittee, which is the working group responsible for developing and maintaining all methodologies relating to wealth forecasting, general financial planning, automated investment selection, and portfolio assignment for Morningstar Investment Management LLC.

His research has been published in a variety of industry and academic journals and received a number of awards, such as the Journal of Financial Planning's 2014 and 2015 Montgomery-Warschauer Award, the Financial Analysts Journal's 2015 Graham and Dodd Scroll Award, and the CFP Board Center for Financial Planning 2017 Academic Research Colloquium Best Investments Paper Award. He is currently an Expert Panelist for the Wall Street Journal and on the editorial board for the Journal of Personal Finance, Journal of Retirement, and Morningstar Magazine. He is also an Adjunct professor of Wealth Management at The American College.

He holds a master's degree in financial services from the American College, a master's degree in business administration from the University of Chicago Booth School of Business, and a doctorate in personal financial planning program from Texas Tech University.