

## MEMORANDUM

**TO:** File Nos: S7-25-22; S7-18-22  
**FROM:** Christian Corkery  
Senior Counsel, Division of Investment Management  
**RE:** Meeting with Representatives of Morningstar, Inc.  
**DATE:** March 7, 2023

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On March 7, 2023, the SEC staff members listed below met with the following representatives of Morningstar, Inc.

SEC Staff:

- William Birdthistle
- Sarah ten Siethoff
- Melissa Harke
- Rachel Loko
- Jennifer Porter
- Elena Stojic
- Christian Corkery
- Lawrence Pace
- Jill Pritzker

Morningstar Representatives:

- Patrick Fay
- Banu Ozlem Unal
- Aron Szapiro
- Sarah Urie
- Jasmin Sethi, CEO Sethi Clarity Advisers

The participants discussed the SEC's *Outsourcing by Investment Advisers* proposal (Release No. IA-6176) and *Request for Comment on Certain Information Providers Acting as Investment Advisers* (Release No. IA-6050).