



MORNINGSTAR PRIVACY POLICY

Scope of this Policy

This policy governs all personally identifiable information collected by Morningstar Corporation and includes, but is not limited to, information collected on our web site, at industry events, through customer visits, via phone and email, or otherwise submitted to us directly. In addition, this includes, but is not limited to information collected from users of our site and users of our products and services.

This policy does not cover third party sites linked to on our website, nor does this policy cover the practices of our third party partners.

Information We Collect

We collect personal and business information you choose to provide. We also collect non-personal information which includes website usage statistics, product preferences, and demographic information.

How We Use Information

The information we collect is used to deliver the products and services we provide, respond to your inquiries, and for research and development purposes.

With your permission, we send periodic advertisements and informational emails. You may change your subscription preferences at any time.

Information you share in public areas of Morningstar's website can be viewed and used by anonymous visitors all over the world. Do not post sensitive or personal information to these areas.

We may use information you provide to one Morningstar product or service to populate your information in other products and services.

We might combine your information with others in aggregate and devoid of personal information to improve our services, facilitate research and development, or to market those services to third parties.

We **do not** sell personal information to third parties.

How We Share Information

We share your information with third parties and affiliates who help us deliver products and services to you. We also share information when required by law. With your consent, your contact information may be disclosed to third parties who can contact you about their products and services.

How we store information

We store your information to enhance your experience when interacting with Morningstar. Some information is stored on Morningstar-owned servers and computers while other information is transmitted and stored with our trusted third party partners (e.g. cloud-based services). All personal information is stored on secure servers and transmitted using SSL encryption. Every effort is made to pick trustworthy partners that utilize security best practices.

How to Contact Us

If you have any questions or comments about this Privacy Policy, or if you would like us to update information we have about you or your preferences, please contact us by email at info@morningstarcorp.com. You also may write to us at:

Morningstar Corporation
Attention: Privacy Policy
8 Pheasant Run
Newtown, PA 18940