

Capital Advisors



Capital Advisors Streamlines Reporting With Morningstar

Keith Goddard
Chief Executive Officer
Capital Advisors, Inc.
Tulsa, Oklahoma

For More Information:
+1 800 886-9324
global.morningstar.com/MorningstarDirect

As a growing practice that serves both individuals and advisors with its investment strategies, Capital Advisors depends on clear communication with clients and prospects. In the last five years, CEO Keith Goddard has seen the company's assets under management double to \$1.5 billion, creating a need for more powerful research, presentation, and reporting tools. This led Goddard and his staff of 18 to start using Morningstar DirectSM in 2013. Since then, he said, the research and reporting tools in Morningstar Direct have led Capital Advisors to talk about the history of the firm as two distinct eras—"We talk about life before Morningstar Direct and life after Morningstar Direct."

Powerful research

Capital Advisors uses the screening tools in Morningstar Direct as a starting point for new investment ideas. "Our philosophy on how you value a stock is very much in sync with Morningstar's philosophy," Goddard said. "Having several thousand stocks reviewed and assigned an intrinsic value by the analyst team at Morningstar gives us a great starting point."

Goddard and his team also depend on Morningstar's data and analysis to help new clients with existing portfolios. "We trust the opinions of Morningstar's stock and mutual fund analysts to help us understand what our clients already own without having to have a team of 15 of us on staff to do that job," Goddard said.

Better, faster client communications

When presenting to clients and prospects, Goddard's team uses Presentation Studio within Morningstar Direct to create branded marketing materials. "It's so much more efficient to have templates of marketing materials in Morningstar Direct and update those templates than trying to figure out graphic design on your own as a money manager," Goddard said. The result, he said, is a better fact sheet that takes a tenth of the time to create.

A higher standard

Since Capital Advisors began to use Morningstar Direct to prepare for presentations, Goddard said, the firm has been closing sales at a noticeably higher rate. Advisors and investors, he said, respect that the fact sheets use Morningstar's extensive database of peer group comparisons, volatility measurements, and historical return data. "There's just a higher standard of credibility that we're bringing to the conversation by using the objective data from Morningstar to present our story," Goddard said.