



Awards™

### **Fund Manager of the Year**

Established in 1988, the annual U.S. Morningstar Fund Manager of the Year awards recognize portfolio managers who demonstrate excellent investment skill and the courage to differ from the consensus to benefit investors. The Fund Manager of the Year winners are chosen based on research and in-depth qualitative evaluation by Morningstar's Manager Research Group.

To recognize outstanding fund managers, awards are given every year in the following asset classes: Domestic Stock, International Stock, Fixed Income, and Allocation/Alternatives.

To be eligible for the award, managers must run open-end funds that are under Morningstar manager research analyst coverage, which includes approximately 1,200 open-end U.S. funds, and have received a Morningstar Analyst Rating™ of Gold, Silver, or Bronze over the past 12 months.

To be nominated, managers must not only have posted impressive returns for the year, but also have a long-term record of delivering outstanding risk-adjusted performance and aligning their interests with those of fund shareholders.

Nominations are made by Morningstar manager research analysts, then narrowed to a list of finalists by each asset-class team. The entire analyst team meets to debate the merits of the finalists in each asset class. Voting commences immediately after each asset-class meeting, and nominees receiving the most votes are the winners.

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