

# Brendan McCann, CFA

ETF & Manager Research | Portfolio Analytics | Python & Morningstar Direct  
Chicago, IL | [brendanmccann0@gmail.com](mailto:brendanmccann0@gmail.com) | 816-853-8165

## WORK EXPERIENCE

### Morningstar Inc. — Associate Manager Research Analyst

Chicago, IL | Oct 2024 – Present

- Conduct in-depth analysis of mutual funds, ETFs, and investment strategies, authoring Morningstar's forward-looking Medalist Ratings for covered strategies.
- Build Python-based analytical workflows (pandas, Jupyter, Morningstar Direct Analytics Lab) to automate data pulls, analyze large investment datasets, and produce data visualizations.
- Interview senior executives and portfolio managers at global asset managers to assess firm culture, incentives, resources, and governance for Morningstar's Parent and People Pillars.
- Write and publish investment research and provide expert market commentary for Morningstar publications and external media outlets, including CNBC and Barron's.

### Morningstar Inc. — Customer Success Manager, Office Platform

Chicago, IL | July 2022 – Oct 2024

- Managed a portfolio of ~120 institutional and advisory clients using Morningstar Office, providing platform guidance and investment analytics support.
- Exceeded client retention and sales goals in 2023 and 2024 through consultative client engagement.
- Earned average CSAT scores above 9.4/10, exceeding team benchmarks.
- Led renewal discussions, negotiated contracts, and identified opportunities to expand client usage of Morningstar solutions.

### Cerner Corporation – Consultant, Patient Accounting

Kansas City, MO | Oct 2020 – July 2022

- Configured patient accounting modules within Cerner Millennium software for a client generating \$3B+ in annual revenue, coordinating across technical and business teams.
- Managed implementation progress, maintained client decision collateral, and conducted system audits to ensure accuracy and compliance.
- Led weekly stakeholder meetings and provided on-site support during system go-live.
- Tracked operational KPIs to assess workflow and system effectiveness.

## EDUCATION & CERTIFICATIONS

### CFA Institute

CFA Charterholder, Awarded October 2025

### University of Kansas

Bachelor of Business Administration, 2018

- Morris Business Plan Competition — Finalist

## SKILLS

- ETF & mutual fund portfolio analysis and performance attribution
- Manager due diligence, including executive and portfolio manager interviews
- Python (pandas, Jupyter, Morningstar Direct Analytics Lab)
- Morningstar Direct, Excel, Microsoft Office