

Bio: Jeffrey Ptak, CFA, is a managing director for Morningstar, Inc.

Before assuming his current role, Ptak was chief ratings officer for Morningstar Research Services and prior to that head of global manager research. Previously, he was president and chief investment officer of Morningstar Investment Services, Inc. Ptak joined Morningstar in 2002 as a mutual fund analyst and also served as director of exchange-traded fund analysis, editor of Morningstar ETFInvestor, and an equity analyst. Before joining Morningstar, Ptak was a manager at Arthur Andersen. From 2020-2021, Ptak served as a member of the Securities and Exchange Commission's Asset Management Advisory Committee.

Ptak holds a bachelor's degree in accounting from the University of Wisconsin and the Chartered Financial Analyst® designation.