## Edgar Filing: Idzorek Thomas - Form 4

| Idzorek Thoma<br>Form 4<br>August 02, 201  | 12  |   |   |                        |  |        |   |  |           |  |
|--|---|---|---|------------------------|--|--------|---|--|-----------|--|
| FORM<br>Check this b<br>if no longer<br>subject to<br>Section 16.<br>Form 4 or<br>Form 5<br>obligations<br>may continu<br><i>See</i> Instruct<br>1(b). | Filed pursuant to<br>Section 17(a) of the | UNITED STATES SECURITIES AND EXCHANGE COMMISSION<br>Washington, D.C. 20549<br>STATEMENT OF CHANGES IN BENEFICIAL OWNERSHIP OF<br>SECURITIES<br>Filed pursuant to Section 16(a) of the Securities Exchange Act of 1934,<br>Section 17(a) of the Public Utility Holding Company Act of 1935 or Section<br>30(h) of the Investment Company Act of 1940 |   |                        |  |        | OMB<br>Number:<br>Expires:<br>Estimated a<br>burden hou<br>response   | January 31,<br>s: 2005<br>ted average<br>hours per                   |           |  |
| (Print or Type Res<br>1. Name and Add<br>Idzorek Thom  | lress of Reporting Person *               | Symbol  | Name <b>and</b> T   |                        | -  |        | 5. Relationship of<br>Issuer  | Reporting Pers   | son(s) to |  |
| (Last) (First) (Middle) 3. [<br>(Mo  |   |   | Morningstar, Inc. [MORN]<br>3. Date of Earliest Transaction<br>(Month/Day/Year)<br>07/31/2012 |                        |  |        | (Check all applicable)          Director       10% Owner         Officer (give title       0ther (specify below)         Pres., Investment Management                                 |  |           |  |
| CHICAGO, II  | (Street)                                  | Filed(Month/Day/Year)   |   |                        |  |        | <ul> <li>6. Individual or Joint/Group Filing(Check Applicable Line)</li> <li>_X_ Form filed by One Reporting Person</li> <li> Form filed by More than One Reporting Person</li> </ul> |  |           |  |
| (City)   | (State) (Zip)                             | Table   | I - Non-Dei   | vivative So            | ecuriti                                      | es Acq | uired, Disposed of  | f, or Beneficial   | ly Owned  |  |
| 1.Title of<br>Security<br>(Instr. 3)   | any                                       | Deemed<br>ution Date, if<br>hth/Day/Year)   | 3.<br>Transactic<br>Code<br>(Instr. 8)<br>Code V  | Disposed<br>(Instr. 3, | d (A) or<br>d of (D)<br>4 and 2<br>(A)<br>or | )      | 5. Amount of<br>Securities<br>Beneficially<br>Owned<br>Following<br>Reported<br>Transaction(s)<br>(Instr. 3 and 4)  | 6. Ownership<br>Form: Direct<br>(D) or<br>Indirect (I)<br>(Instr. 4) |           |  |
| Common<br>Stock<br>(Restricted<br>Stock Units)   | 07/31/2012                                |   | A   | 15 <u>(1)</u>          | A  | \$ 0   | 12,807  | D  |           |  |

Reminder: Report on a separate line for each class of securities beneficially owned directly or indirectly.

Persons who respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.

## Edgar Filing: Idzorek Thomas - Form 4

 Table II - Derivative Securities Acquired, Disposed of, or Beneficially Owned

 (e.g., puts, calls, warrants, options, convertible securities)

| 1. Title of<br>Derivative<br>Security<br>(Instr. 3) | 2.<br>Conversion<br>or Exercise<br>Price of<br>Derivative<br>Security | 3. Transaction Date<br>(Month/Day/Year) | 4.<br>Transactio<br>Code<br>(Instr. 8) | 5.<br>orNumber<br>of<br>Derivative<br>Securities<br>Acquired<br>(A) or<br>Disposed<br>of (D)<br>(Instr. 3,<br>4, and 5) |                     | ate                | Amou<br>Unde<br>Secur | le and<br>unt of<br>rlying<br>rities<br>. 3 and 4) | 8. Price of<br>Derivative<br>Security<br>(Instr. 5) | 9. Nu<br>Deriv<br>Secur<br>Bene<br>Owne<br>Follo<br>Repo<br>Trans<br>(Instr |
|---|---|---|--|---|---------------------|--------------------|-----------------------|--|---|---|
|   |   |   | Code V                                 | (A) (D)   | Date<br>Exercisable | Expiration<br>Date | Title                 | Amount<br>or<br>Number<br>of<br>Shares             |   |   |

## **Reporting Owners**

| Reporting Owner Name / Address  | Relationships |           |                              |       |  |  |  |
|---|---------------|-----------|------------------------------|-------|--|--|--|
| F   | Director      | 10% Owner | Officer                      | Other |  |  |  |
| Idzorek Thomas<br>C/O MORNINGSTAR, INC.<br>22 WEST WASHINGTON STREET<br>CHICAGO, IL 60602 |               |           | Pres., Investment Management |       |  |  |  |
| Signatures  |               |           |                              |       |  |  |  |
| Heidi Miller, by power of attorney  | 08/02/2       | 012       |                              |       |  |  |  |

\*\*Signature of Reporting Person

Date

## **Explanation of Responses:**

- \* If the form is filed by more than one reporting person, see Instruction 4(b)(v).
- \*\* Intentional misstatements or omissions of facts constitute Federal Criminal Violations. See 18 U.S.C. 1001 and 15 U.S.C. 78ff(a).
- (1) Includes 15.0460 restricted stock units acquired on July 31, 2012 pursuant to a dividend reinvestment feature of the Morningstar, Inc. 2011 Stock Incentive Plan.

Note: File three copies of this Form, one of which must be manually signed. If space is insufficient, *see* Instruction 6 for procedure. Potential persons who are to respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB number.