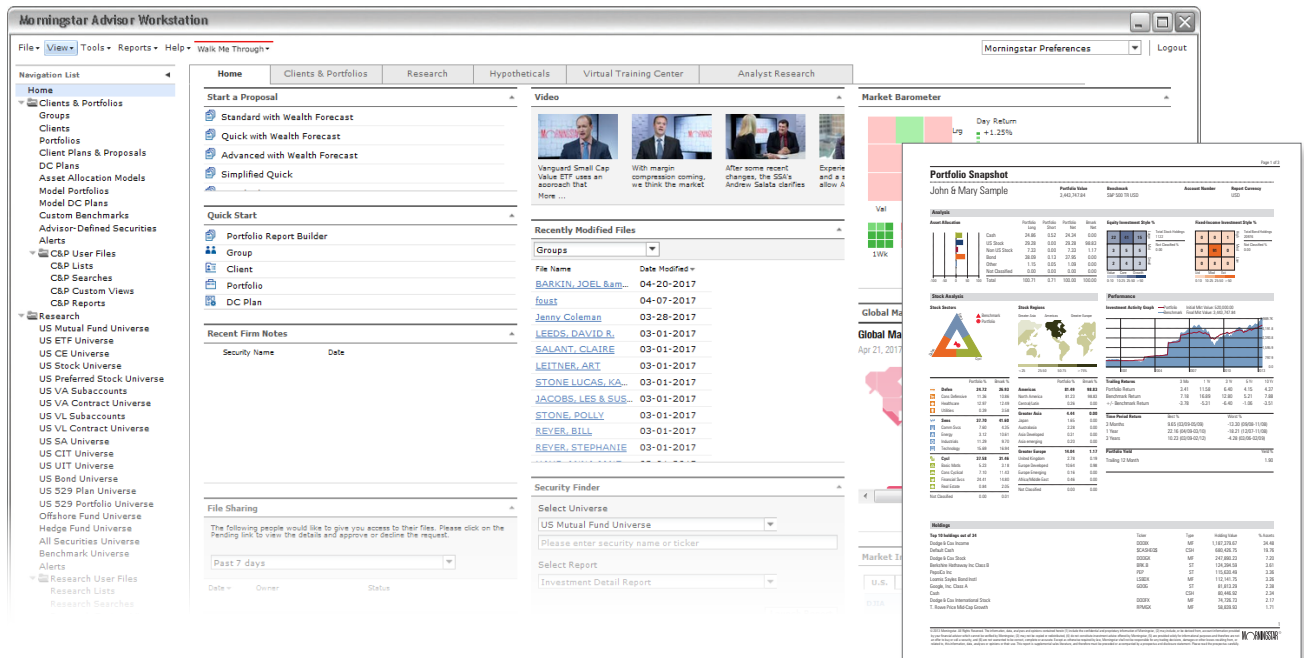


# Morningstar® Advisor Workstation<sup>SM</sup>



Morningstar® Advisor Workstation<sup>SM</sup> integrates client positions, saving the time and errors that can result from manually entering data. It helps advisors analyze client portfolios and create compelling reports in a few simple steps.

## Investment Research

To support the research process, Morningstar® Advisor Workstation<sup>SM</sup> combines high-quality data with in-depth reports from our independent analysts to help advisors determine suitable investments for clients and prospects. Advisors can screen and rank open-end mutual funds, stocks, variable annuity/life subaccounts, exchange-traded funds, closed-end funds, separate accounts, and 529 college-savings plans. After completing the screening, advisors can look further into an investment by using analyst reports with exclusive Morningstar research on thousands of stocks and mutual funds. After they have refined their security recommendations, advisors can share these with clients through Morningstar® Investment Detail<sup>TM</sup> reports.

## Portfolio Construction and Diagnostics

Advisor Workstation helps advisors quickly build, analyze, and monitor client portfolios.

Three key reports—Morningstar® Portfolio Snapshot,<sup>TM</sup> Morningstar® Stock Intersection,<sup>SM</sup> and Morningstar® Portfolio X-Ray® Report—help uncover shortcomings in a portfolio.

## Planning Tools

With Advisor Workstation, advisors can determine a client's risk tolerance and investment goals to build diversified, appropriate portfolios. A risk-tolerance questionnaire identifies risk profiles for assigning suitable model portfolios. Then, the advisor can select asset allocations from an efficient frontier curve and run Monte Carlo projections illustrating possible outcomes to demonstrate how different strategies might succeed.

## Hypothetical Illustrations

Through hypothetical sales illustrations, advisors can demonstrate how recommendations would have affected a client's wealth. Illustrations can include details such as investments, withdrawals, reinvestment

of dividends, taxes, investment fees (reflecting real breakpoints), and other charges to portray real-world scenarios. The underlying holdings in the Morningstar database make it possible to show performance within the context of asset allocation, sector weightings, and style diversification information.

## Morningstar for Advisors<sup>SM</sup> iPad® App

Our app makes the Morningstar reports, ratings, and research you and your clients know available on your iPad.® Even when you're away from your desk, you can have more personal, interactive client conversations—with the information you need at hand.

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