

Integrations Available for Direct Advisory Suite

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Automatic Overnight Batch Integration via RJ Net

The Overnight Batch Integration allows client data to load automatically into Direct Advisory Suite. Automating the client and portfolio import process will help you work more efficiently and effectively with your entire base of clients. Save time with Morningstar Direct Advisory Suite so you can spend more moments engaging with clients.

eMoney Advisor

The Morningstar and eMoney Advisor integration saves you time by eliminating the need to switch between the two platforms. With this integration, you can get seamless access to Direct Advisory Suite FINRA-reviewed reports directly within eMoney Advisor.

This integration also gives you the ability to import client data (existing client positions) from eMoney Advisor into Direct Advisory Suite.

MoneyGuidePro

Morningstar Direct Advisory Suite integrates with MoneyGuidePro to streamline data transfer and reduce manual entry. With one click, users can export client portfolios, including underlying holdings, into Direct Advisory Suite for detailed analysis through reports like Portfolio Snapshot and Portfolio X-Ray. Additionally, key Morningstar portfolio reports, including individual security reports, can be generated directly within MoneyGuidePro.

This integration also gives you the ability to import client data (existing client positions) from MoneyGuidePro into Direct Advisory Suite.

Redtail

The Morningstar and Redtail integration saves you time by eliminating the need to switch between the two solutions. With this integration, you can get seamless access to Direct Advisory Suite portfolio-level and security-level reports directly within Redtail.

Albridge

With this import integration, you can bring client portfolio data from Albridge into Direct Advisory Suite.