

Integrations Available for Advisor Workstation

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Automatic Overnight Batch Integration via Vision2020

The Overnight Batch Integration allows client data to load automatically into Advisor Workstation. 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 Advisor Workstation 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 Advisor Workstation 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 Advisor Workstation.

eMoney Integration: Each advisor must send an email to eMoney data services requesting integration to be setup:

1. Send an email authorizing integration to the following address: dataservicesupport@emoneyadvisor.com
2. In the email, the advisor must provide their eMoney Advisor user ID and their Morningstar Advisor Workstation login ID.
3. By the next morning, the integration will be live on the eMoney side.

MoneyGuidePro

Morningstar Advisor Workstation integrates with MoneyGuidePro to streamline data transfer and reduce manual entry. With one click, users can export client portfolios, including underlying holdings, into Advisor Workstation 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 Advisor Workstation.

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 Advisor Workstation portfolio-level and security-level reports directly within Redtail.

Albridge

With this import integration, you can bring client portfolio data from Albridge into Advisor Workstation.