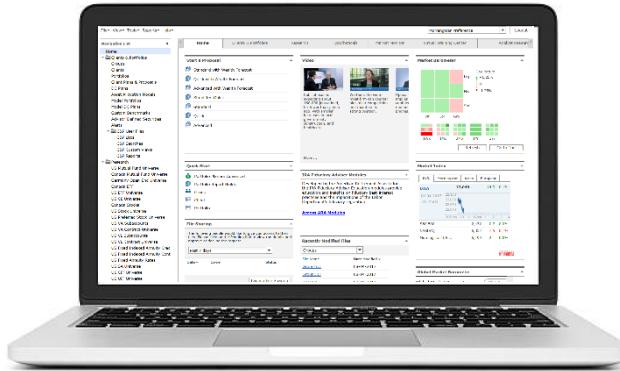


Morningstar Advisor Workstation Quickstart for New Users



Welcome to Morningstar Advisor Workstation!

Our software platform is built specifically around the workflows of financial advisors to help position and market products, construct portfolios, analyze investments, and connect with investors. Follow the steps below to help you get started.

Get Started!

- 1 Get an **overview** of Morningstar Advisor Workstation
- 2 Use the **Quick Start Guide** to learn the key capabilities available within Advisor Workstation
- 3 Learn how to build **preferences** in Advisor Workstation to save time and effort for the whole team
- 4 Use our **Help** menu to contact Morningstar Support

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Next Steps

Once you complete the above tasks and have a basic knowledge of Morningstar Advisor Workstation, be sure to check out other useful resources in the Virtual Training Center tab within Advisor Workstation.

