

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

## Membership Plan Comparison

|                                   |  | Assess<br>\$3,500/year<br>(\$291/month) | Plan<br>\$4,250/year<br>(\$354/month) | Engage<br>\$4,750/year<br>(\$396/month) |
|-----------------------------------|--|---|---------------------------------------|---|
| Investment Data                   | <i>US Standard:</i> Mutual Funds, ETFs, CE, (Preferred) Stock, Bonds   | ✓                                       | ✓                                     | ✓                                       |
|                                   | <i>US Advanced:</i> CIT, UIT, 529 Plan/Portfolio, Index, Offshore Fund, Hedge Funds, Separate Accounts   | ✓                                       | ✓                                     | ✓                                       |
|                                   | <i>Income Solutions:</i> Fixed Annuity Contract, Fixed Annuity Rates, Variable Life Subaccounts, Fixed Indexed Annuity Crediting Strategies, Fixed Annuity Contract, and Structured Products | ✓                                       | ✓                                     | ✓                                       |
| Research & Due Diligence          | Morningstar Analyst Research   | ✓                                       | ✓                                     | ✓                                       |
| Client & Prospect Engagement      | FINRA-compliant client-facing reports including: Portfolio X-Ray, Portfolio Comparison, Investment Detail Report, Stock Intersection, Snapshot Report  | ✓                                       | ✓                                     | ✓                                       |
|                                   | Morningstar Portfolio Risk Score   | ✓                                       | ✓                                     | ✓                                       |
|                                   | Scenario Builder   | ✓                                       | ✓                                     | ✓                                       |
| Portfolio Management & Monitoring | Clients & Portfolios   | ✓                                       | ✓                                     | ✓                                       |
| Investment Planning               | Goal-Based Investment Planning   |   | ✓                                     | ✓                                       |
|                                   | Investment Proposal Tool   |   | ✓                                     | ✓                                       |
|                                   | Best Interest Investment Recommendation  |   |                                       | ✓                                       |
|                                   | Morningstar Risk Tolerance Questionnaire   |   | ✓                                     | ✓                                       |
|                                   | Morningstar Risk Ecosystem   |   | ✓                                     | ✓                                       |
|                                   | Sustainability Preferences & Portfolio Optimization Tool   |   | ✓                                     | ✓                                       |
| Companions                        | Morningstar for Advisors Mobile App  | ✓                                       | ✓                                     | ✓                                       |
|                                   | IDA (Your Intelligent Digital Assistant)   | ✓                                       | ✓                                     | ✓                                       |
|                                   | App Hub  | ✓                                       | ✓                                     | ✓                                       |
|                                   | Direct Compass   | ✓                                       | ✓                                     | ✓                                       |
|                                   | Integrations available: MoneyGuide Pro, eMoney, Redtail, RightCapital and more*  | ✓                                       | ✓                                     | ✓                                       |

Subscription Term: Annual.

\*Not included with Advisor Workstation membership. In order to access you must subscribe then activate the integration.

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