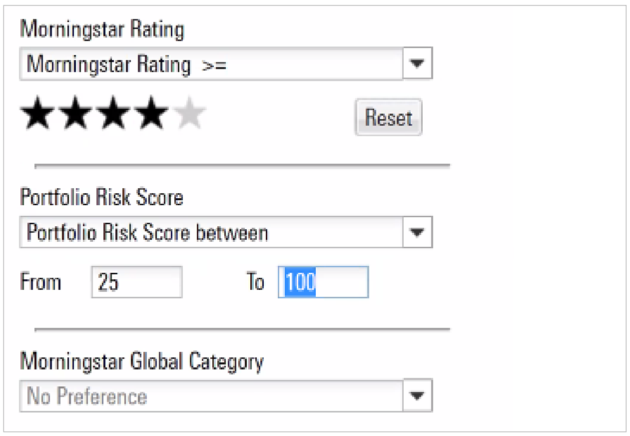
Morningstar® Advisor Workstation
Plan Membership

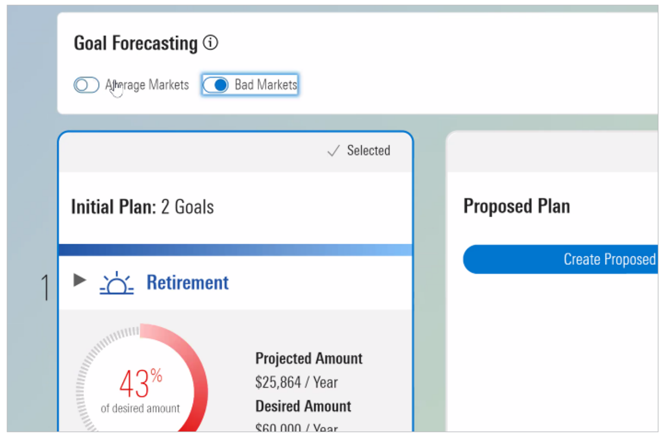
Create investment plans that connect to your clients' financial goals

Morningstar® Advisor Workstation has the tools and research you need to optimize your most critical advisor workflows – from one platform. Attract new clients, drive better investor outcomes through accessible financial planning capabilities, comply with current and future regulatory needs, and digitally quantify decision trade-offs.



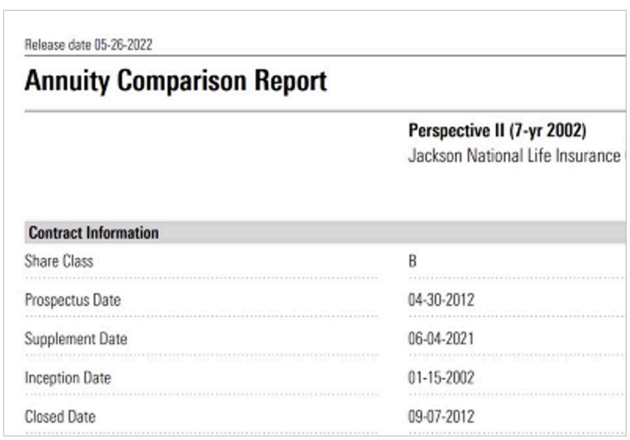
Align Risk to Investment Proposals

Match your client's goals with firmwide strategies that drive towards their financial objectives using investment models, lists, and strategies. You can also run Monte Carlo projections to illustrate how different strategies might succeed.



Simplify Goal Planning

Help clients identify meaningful goals and take action to make them a reality. Use Goal Bridge to have goals-based conversations and connect goals to a straightforward investment plan.


Release date 05-26-2022

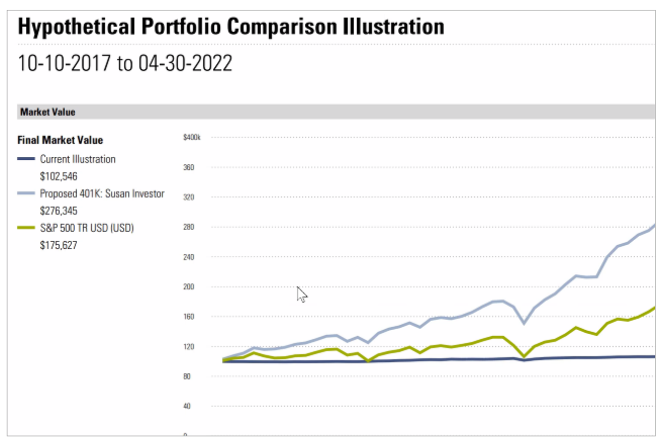
Annuity Comparison Report

Perspective II (7-yr 2002)
Jackson National Life Insurance

Contract Information	
Share Class	B
Prospectus Date	04-30-2012
Supplement Date	06-04-2021
Inception Date	01-15-2002
Closed Date	09-07-2012

Clearly Explain Annuity Complexities

No need to dig through prospectuses. Our team parses through the data to translate it into simple terms. Get side-by-side comparisons and summaries that show contract details, benefit information, and how the annuity makes money.



Stress Test Your Recommendations with Scenario Builder

Demonstrate how your recommendations would have affected a prospect's wealth to secure new business with hypothetical sales illustrations. Include details such as investments, withdrawals, reinvestment of dividends, taxes, and more.

MORNINGSTAR®