

Morningstar® Advisor Workstation

Assess Membership

Data, research, and visuals that make hard decisions easier

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.

Morningstar Rating

Morningstar Rating >=

★★★★★

Reset

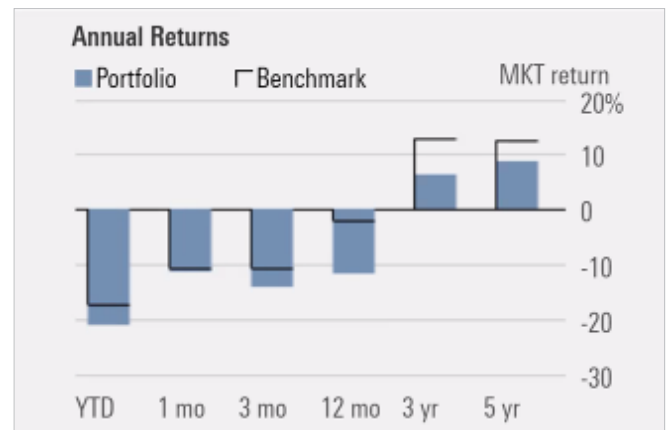
Portfolio Risk Score

Portfolio Risk Score between

From 25 To 100

Morningstar Global Category

No Preference

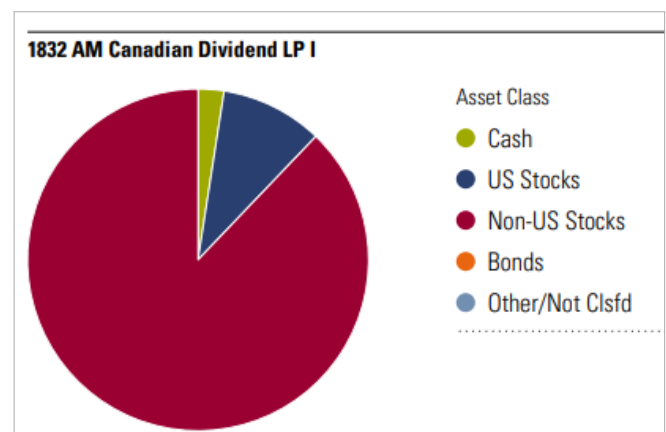
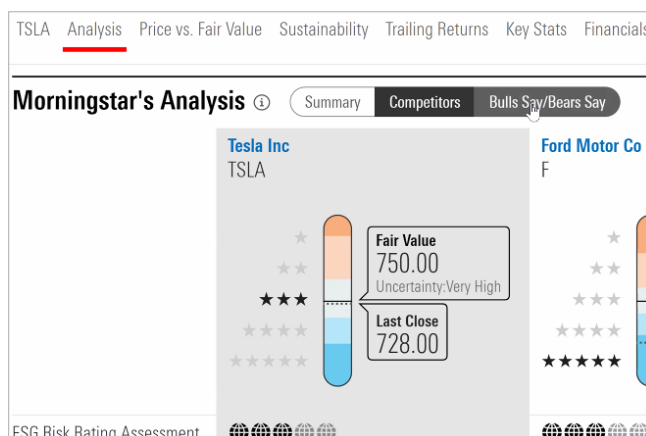


Save Time with Powerful Research Simplified

Assess investments with the broadest and deepest investment coverage in the industry. Powerful tools allow you to easily analyze information to present results to clients and prospects.

Win Business with Industry-Reviewed Client-Friendly Reports

Monitor and improve investment strategies in the Clients and Portfolios module. Create easy to understand client-friendly reports to show your unique strategies with 10+ report options.



Build Trust with Analyst Research

Back investment proposals the data and insight that our global analysts use to follow the market. Access videos, reports, and more on thousands of stocks, ETFs, funds, and IPOs.

Conduct In-Depth Portfolio Analysis

Easily share insights with clients using easy to-read reports. The portfolio Snapshot Report provides a detailed overview of a portfolio's most important aspects, including asset allocation, investment style, sector weightings, and performance.