

Morningstar® Advisor WorkstationSM Data Integration with LPL ClientWorks

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<https://www.morningstar.com/business/brands/data-analytics/products/advisor-workstation>

Advisor Workstation LPL Financial Edition

Advisor Workstation is Morningstar's web-based solution, customized for LPL Financial advisors, to help serve existing clients and generate new business. Advisor Workstation LPL Financial Edition contains the latest Morningstar research, client presentation, portfolio analytics and investment planning capabilities. Best of all, Advisor Workstation produces results. The concise, visually-compelling reports strengthen messages to clients and make the most convincing case for recommendations.

Key Benefits

- ▶ Allows easy transfer of client, portfolio, and holdings data.
- ▶ Reduces manual data entry, saving hours of time and effort.
- ▶ Decreases data errors and the time it takes to fix them
- ▶ Improves speed of service.
- ▶ Reduces compliance risk via the use of consistent data across applications.
- ▶ Provides a complete financial analysis for clients, taking into account real-time portfolio holdings.

Data Integration with ClientWorks

Managing client data can be a major time drain on an advisor's practice—and the time spent on manual data input could be better spent elsewhere. Advisor Workstation subscribers can easily import relevant data, including securities and shares, from ClientWorks. By importing data directly into Advisor Workstation, advisors can decrease errors, reduce compliance risk, and provide their clients with a complete financial analysis that takes into account real-time portfolio holdings. With less time spent on back-office tasks, there's more time to cultivate client relationships and prospect for new clients.

To Enable Integration

- ▶ Send an email to CTM.mailbox@lpl.com.
- ▶ Provide your case-sensitive LPL Master Rep ID, Advisor Workstation user name, and Inst ID (navigate to Help then Support within Advisor Workstation) in the body of the email.
- ▶ You will receive an e-mail from LPL Order Fulfillment once ClientWorks upload capability has been completed (usually within 3 business days).