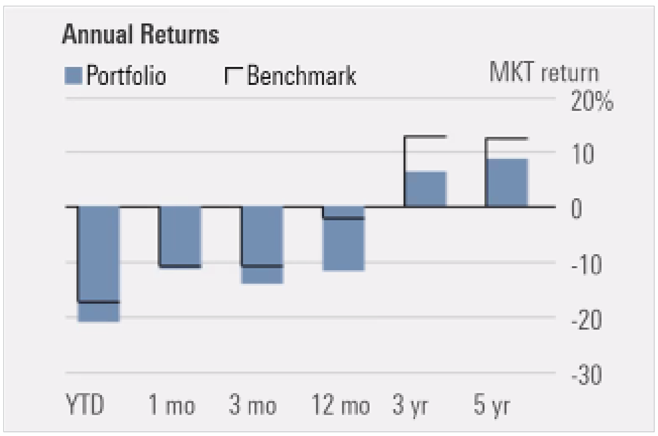
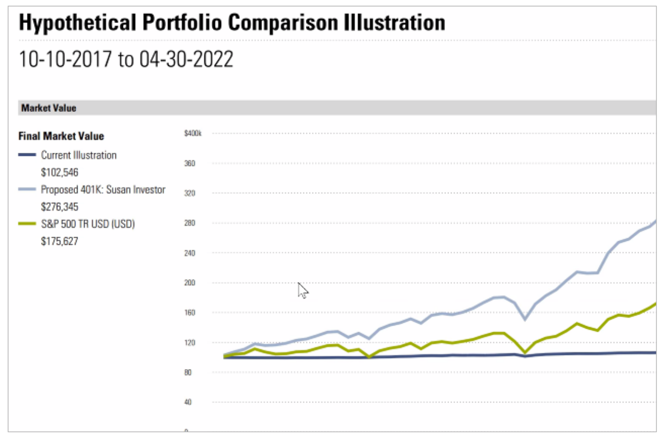
Morningstar® Advisor Workstation
Engage Membership

Clearly communicate with your clients, stay ahead of regulations, and build investor trust

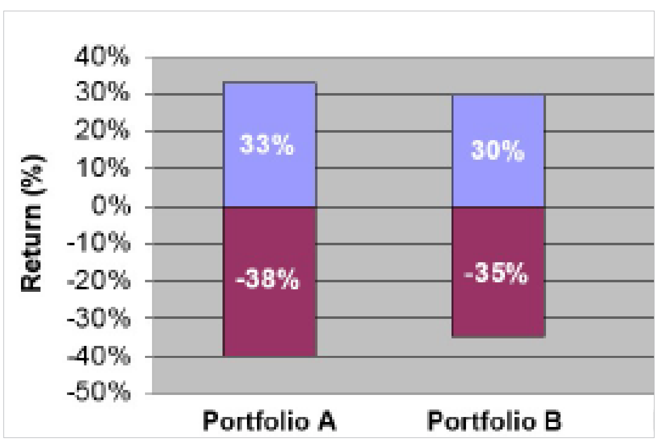
Morningstar® Advisor Workstation has the tools and research you need to optimize your most critical advisor workflows – from one platform. Attract new clients, drive better investor outcomes through accessible financial planning capabilities, comply with current and future regulatory needs, and digitally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



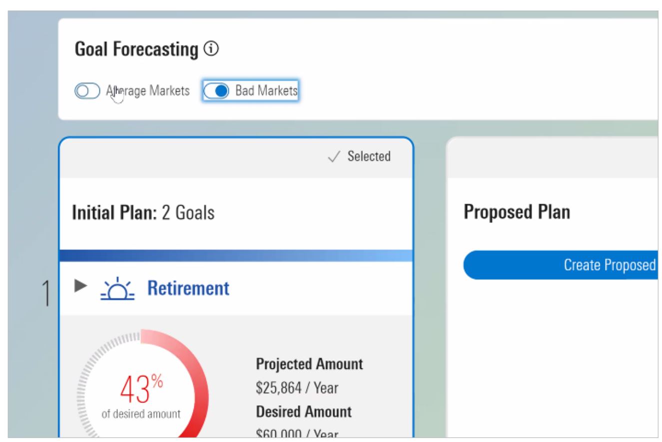
Win Business with Industry-Reviewed Client-Friendly Reports
Monitor and improve investment strategies in the Clients and Portfolios module. Create easy to understand client-friendly reports to show your unique strategies with 10+ report options.



Stress Test Your Recommendations with Hypothetical Illustration Tool
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.



Select Best Interest Investments
We help you navigate your product shelf with independent research and an intuitive interface that filters selections and conducts comparisons based on the best interest of the client.



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.