

Morningstar® Advisor Workstation

Assess Membership

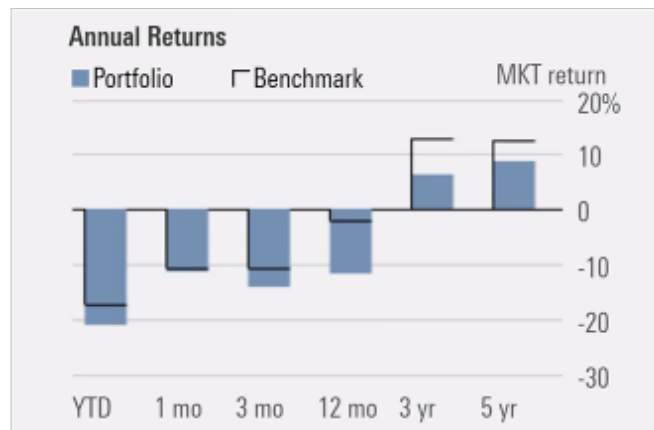
Data, research, and visuals that make hard decisions easier

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

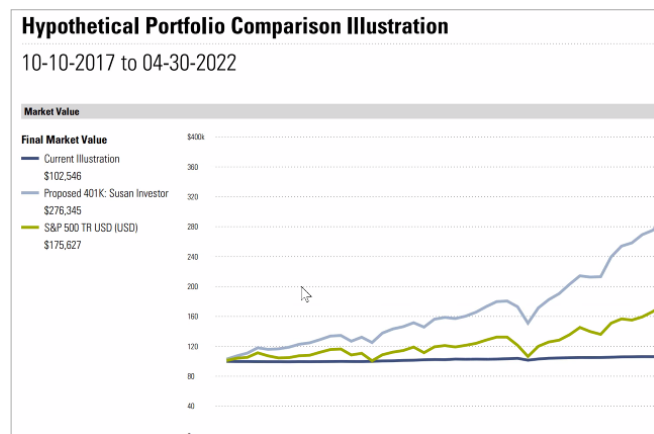
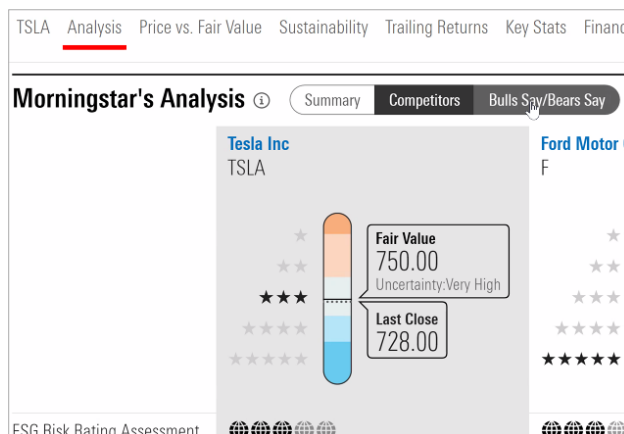


Save Time with Powerful Research Simplified

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 FINRA-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.

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.