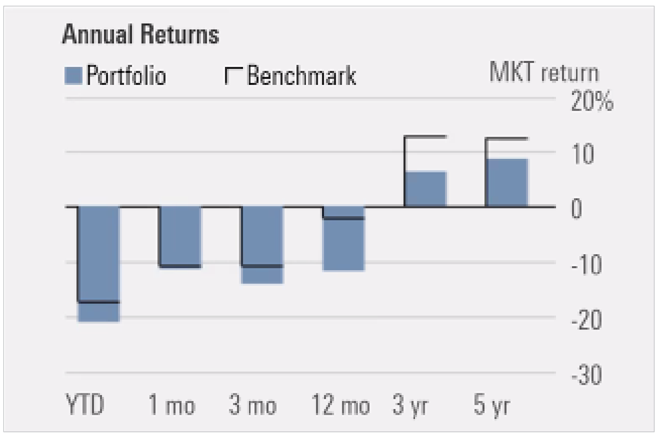
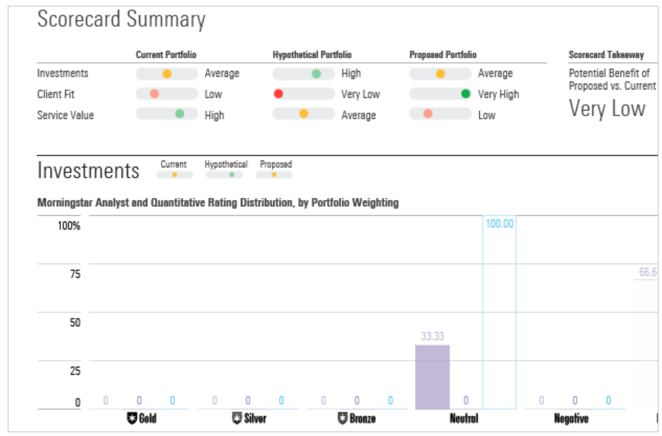
Morningstar® Advisor Workstation
Engage Membership

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

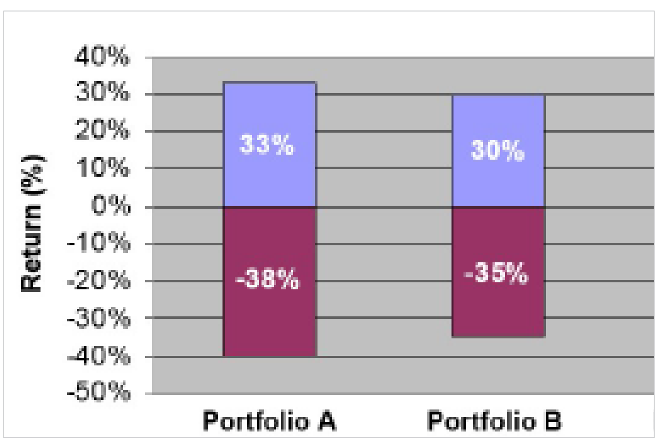
Morningstar® Advisor Workstation has the tools and research you need to optimize your most critical advisor workflows – from one platform. Attract new clients, drive better investor outcomes through accessible financial planning capabilities, comply with current and future regulatory needs, and digitally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



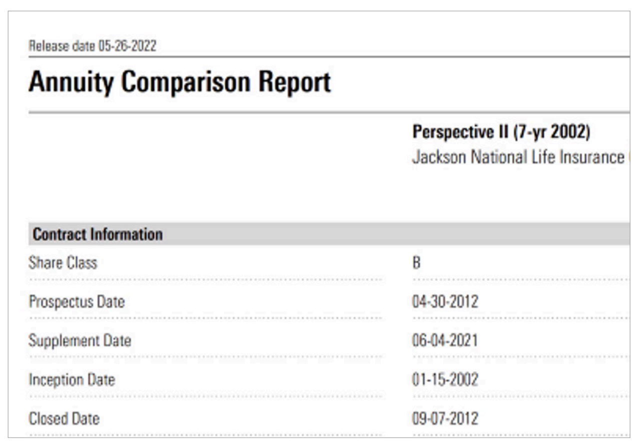
Win Business with FINRA-Reviewed Client-Friendly Reports
Monitor and improve investment strategies in the Clients and Portfolios module. Create easy to understand client-friendly reports to show your unique strategies with 10+ report options.



Demonstrate The Value Of A 401(k) To IRA Rollover And Win Outside Assets
Show that your recommendation to roll over funds is in the client's best interest with the best interest scorecard and easy-toassemble reports. Share a quantifable assessment of the value provided by rollover vs 401(k).



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.


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.