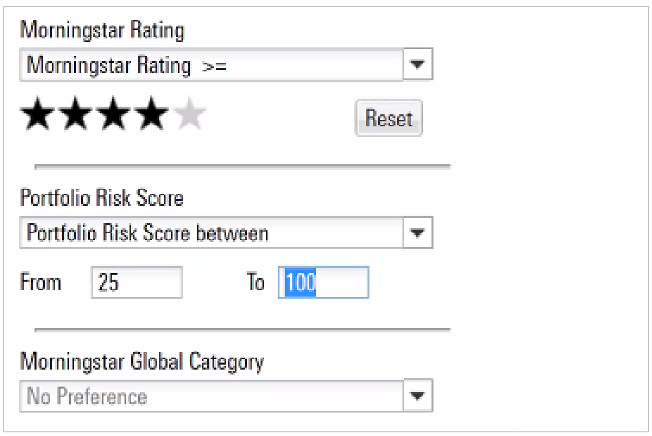
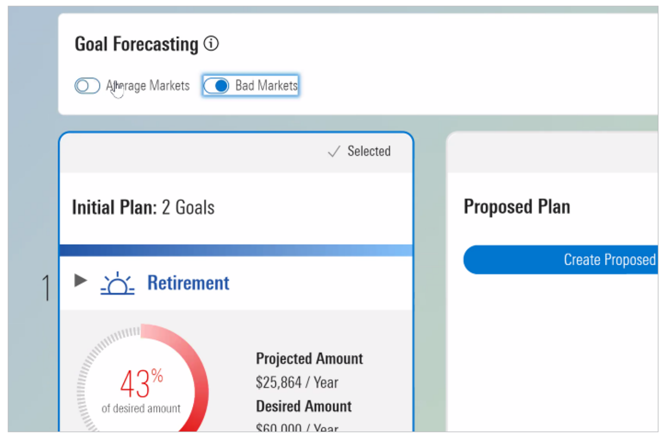
Morningstar® Advisor Workstation
Plan Membership

Create investment plans that connect to your clients' financial goals

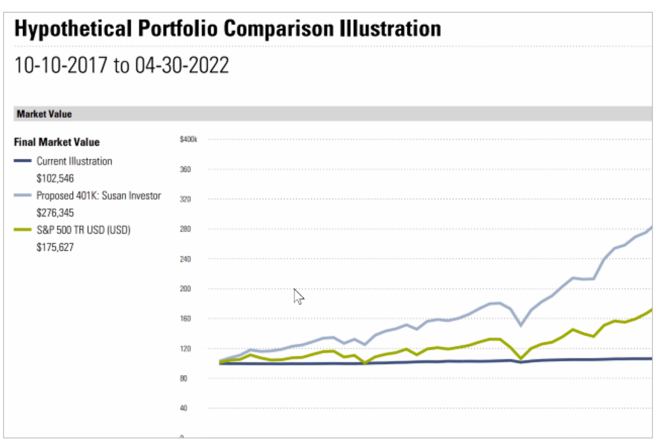
Morningstar® Advisor Workstation has the tools and research you need to optimize your most critical advisor workflows – from one platform. Attract new clients, drive better investor outcomes through accessible financial planning capabilities, comply with current and future regulatory needs, and digitally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



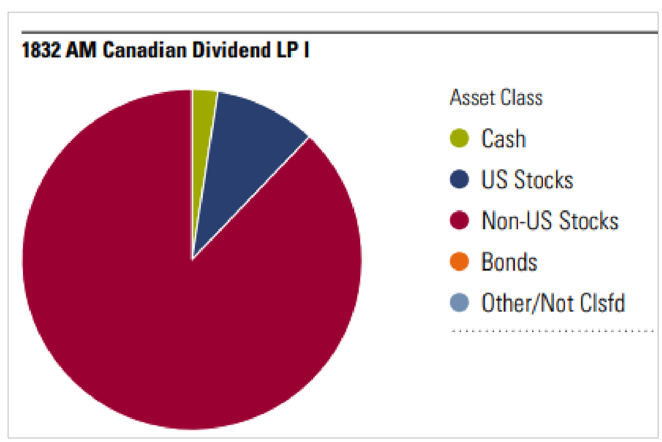
Align Risk to Investment Proposals
Match your client's goals with firmwide strategies that drive towards their financial objectives using investment models, lists, and strategies. You can also run Monte Carlo projections to illustrate how different strategies might succeed.



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.



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.



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.