

Morningstar[®] Advisor WorkstationSM

Membership Plan Comparison

		Assess \$890/year	Plan \$1,340/year	Engage \$1,780/year
Investment Data	Mutual & Seg Funds	✓	✓	✓
	Canadian ETFs	✓	✓	✓
Research	Research Module	✓	✓	✓
Client & Prospect Engagement	Client-facing reports	✓	✓	✓
	Morningstar Portfolio Risk Score	✓	✓	✓
	Investment Proposal Tool			✓
Portfolio Analysis & Optimization	Clients & Portfolios	✓	✓	✓
Goals-based Investment Planning & Proposal Generation	Goal-Based Investment Planning		✓	✓
	Hypothetical Illustration Tool		✓	✓
	Morningstar Risk Tolerance Questionnaire		✓	✓
	Morningstar Risk Ecosystem		✓	✓
Companions	Morningstar for Advisors Mobile App	✓	✓	✓
	IDA (Your Intelligent Digital Assistant)	✓	✓	✓