

Morningstar Managed Accounts Disclosures

¹Blanchett, D. 2019. "The Impact of Managed Accounts on Participant Savings and Investment Decisions."
<https://www.morningstar.com/lp/impact-of-managed-accounts>.

A total of 60,825 retirement plan participants were included in this study, were selected for use based on available information and various filters, and include those participants that used the Morningstar Retirement Manager Managed Accounts service between January 5, 2007 and June 4, 2018.

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