

Morningstar[®] Advisor WorkstationSM

Individual Membership Plan Comparison

	Asses \$3,500/year (\$291/month)	Plan \$4,250/year (\$354/month)	Engage \$4,750/year (\$396/month)
Investment Data			
<i>US Standard:</i> Mutual Funds, ETFs, CE, (Preferred) Stock, Bonds	✓	✓	✓
<i>US Advanced:</i> CIT, UIT, 529 Plan/Portfolio, Index, Offshore Fund, Hedge Funds, Separate Accounts	✓	✓	✓
<i>Income Solutions:</i> Fixed Annuity Contract, Fixed Annuity Rates, Variable Life Subaccounts, Fixed Indexed Annuity Crediting Strategies, Fixed Annuity Contract, and Structured Products	✓	✓	✓
Research & Due Diligence			
Morningstar Analyst Research	✓	✓	✓
Client & Prospect Engagement			
FINRA-compliant client-facing reports including: Portfolio X-Ray, Portfolio Comparison, Investment Detail Report, Stock Intersection, Snapshot Report	✓	✓	✓
Morningstar Portfolio Risk Score	✓	✓	✓
Scenario Builder	✓	✓	✓
Portfolio Management & Monitoring			
Clients & Portfolios	✓	✓	✓
Investment Planning			
Goal-Based Investment Planning		✓	✓
Investment Proposal Tool		✓	✓
Best Interest Investment Recommendation			✓
Morningstar Risk Tolerance Questionnaire		✓	✓
Morningstar Risk Ecosystem		✓	✓
Sustainability Preferences & Portfolio Optimization Tool		✓	✓
Companions			
Morningstar for Advisors Mobile App	✓	✓	✓
IDA (Your Intelligent Digital Assistant)	✓	✓	✓
App Hub	✓	✓	✓
Direct Compass	✓	✓	✓
Integrations available: MoneyGuide Pro, eMoney, Redtail, RightCapital and more*	✓	✓	✓

Subscription Term: Annual.

* Not included with Advisor Workstation membership. In order to access you must subscribe then activate the integration.