Custom made solutions for your business and client goals

The Morningstar Wealth Solutions team works exclusively with strategic partners to create an end to end investment and business solution; enabling scale and powering your biggest opportunities.

A business to business consultation service

Taking the time to truly understand your business aspirations, the Morningstar Wealth Solutions team works in partnership with you to create a proposition that addresses your business challenges whilst meeting your specific business and client profile needs.

A partnership that:



Using insights and best practices from firms around the world, we work with you to build and implement an optimised business strategy



Maps out a path to reach ideal business outcomes whilst focusing on delivering investment outcomes for your clients

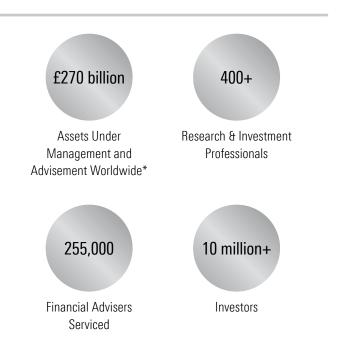


Provides actionable strategies to accelerate business growth and efficiency



Supports your advisers to meet both your business and your end client goals

Morningstar's heritage in research, investing and technology sets us apart; enabling us to bring rigour, depth and broad expertise to a discovery process and resulting solution.



*equivalent to approximately \$338 billion as at 31 December 2024

A single mission to empower investor success

Morningstar is a mission-focused, diverse business, active across the world, including EMEA and the UK. The company offers an extensive line up of products and services for a range of investors; with a single mission of empowering investor success.

Combining world class investment portfolios with an adviser to client support program

Morningstar is a leading authority on asset allocation, investment research and portfolio construction. Our multi asset investment portfolios bring together global Morningstar resources across our core capabilities including asset allocation, capital markets research, multi-asset portfolio construction, security selection and manager research.

Combining our world class multi asset investment expertise with a client-focused adviser service program, you'll have insider access to tools, insights and content that help keep your clients engaged and on track with the financial plans you have created for them.

We truly understand advisers and their clients

Contact your local sales representative

wealthsolutions@morningstar.com

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Unparalleled depth and breadth of research powering your client outcomes

Our investment managers have access to the insights from a 400+ global Research and Investment Team. This depth of global research enables us to build robust portfolios focused on achieving your clients' goals. Further, we're able to share these insights with you to help your clients confidently face the ups and downs of investment markets; in doing so preventing them making decisions which could have long lasting consequences on their ability to reach their goals.



About Morningstar Wealth

Morningstar Wealth is a global organisation dedicated to empowering both advisors and investor success. Our extensive range of offerings includes Morningstar Wealth Platform, Morningstar Managed Portfolios managed by Morningstar Investment Management and Smart Investment Management (\$338 billion in assets under management and advisement as of December 31, 2024), Morningstar Wealth Software (licenced software and professional services) and Morningstar.co.uk. Services available through Morningstar Wealth vary region to region. To learn more about Morningstar Wealth regulated entities and products in EMEA, please visit Morningstar Wealth EMEA Disclaimers.

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