MORNINGSTAR Wealth

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.

£270 billion
Assets Under Management and Advisement Worldwide*

400+
Research & Investment Professionals

255,000
Financial Advisers Serviced

10 million+
Investors

*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

Morningstar Wealth

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.

Talk to us today for solutions to:

- Relieve cost and regulatory pressures
- Build efficiencies and scale within your business
- Improve investor outcomes
- Deliver professional development to your advisers

MORNINGSTAR Wealth

Important Information

This brochure does not constitute investment, legal, tax or other advice and is supplied for information purposes only to the intended audience. Past performance is not a guide to future returns. The value of investments may go down as well as up and an investor may not get back the amount invested. Reference to any specific security is not a recommendation to buy or sell that security. The information, data, analyses, and opinions presented herein are provided as of the date written and are subject to change without notice. Every effort has been made to ensure the accuracy of the information provided, but Morningstar Investment Management Europe Ltd makes no warranty, express or implied regarding such information. The information presented herein will be deemed to be superseded by any subsequent versions of this brochure. Except as otherwise required by law, Morningstar Investment Management Europe Ltd shall not be responsible for any trading decisions, damages or losses resulting from, or related to, the information, data, analyses or opinions or their use.

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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