Morningstar® Advisor Workstation℠ for LPL Financial

Morningstar Advisor Workstation is a web-based investment planning platform that contains capabilities for research, portfolio analysis, and sales presentations. Advisor Workstation makes sharing insight with clients and prospects easy with compelling, FINRA-reviewed reports. Best of all, it helps minimize the time spent on client data management through integration with *ClientWorks.

Individual Membership Plan Comparison

	Solution 1 $1839/year (153.25/month)	Solution 2 $2349.96/year ($195.83/month)	Solution 3 $3345.96/year (278.83/month)	Solution 4 $2492.04/year ($207.67/month)	Solution 5 $2646/year ($220.50/month)	Solution 6 $3683.04 ($306.92/month)
Investment Universes						
Open-End Mutual Funds	✓	✓	✓	✓	✓	✓
Closed-End Funds	✓	✓	✓	✓	✓	✓
Exchange-Traded Funds	✓	✓	✓	✓	✓	✓
VA/VUL Policy & Subaccounts		✓	✓	✓	✓	✓
Stocks		✓	✓	✓	✓	✓
Preferred Stocks					✓	✓
529 Plans		✓	✓	✓	✓	✓
Separate Accounts			✓			✓
Bonds				✓	✓	✓
Collective Investment Trusts			✓			✓
Unit Investment Trusts					✓	✓
Modules						
Research	✓	✓	✓	✓	✓	✓
Clients & Portfolios	✓	✓	✓	✓	✓	✓
Scenario Builder (formerly Hypothetical)		✓	✓	✓	✓	✓
Direct Compass (Mutual Funds)	✓	✓	✓	✓	✓	✓
Direct Compass (Stocks)			✓			✓
Direct Compass (ETFs)			✓			✓
Planning (Investment Proposal)			✓			✓
Additional Capabilities						
Presentation Library			✓			✓

Subscription Term: Annual
Learn More: morningstar.com/try/lpl-financial
Contact Sales: 877-586-5405

*An Advisor Workstation subscription is required for the ClientWorks integration. In order to access, you must subscribe and then activate the integration.

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