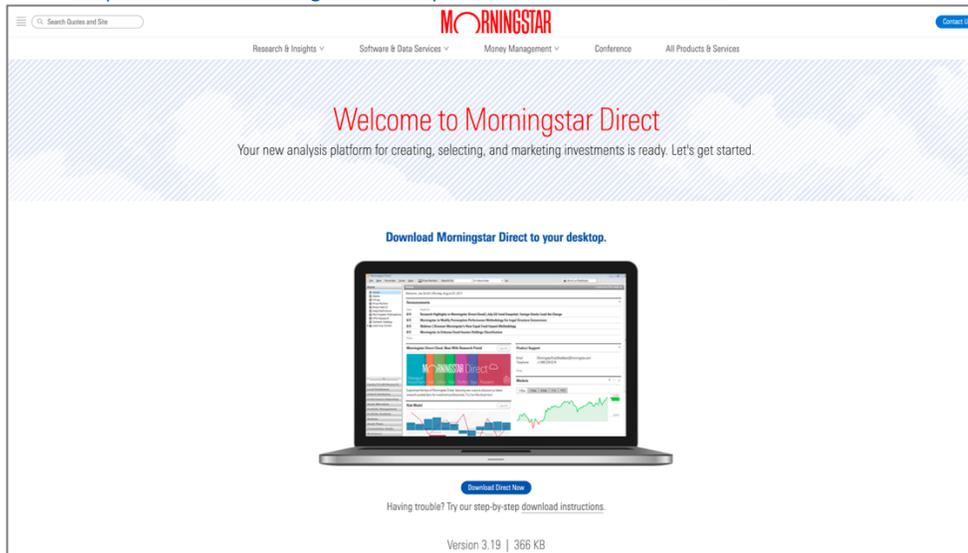


Access Morningstar Software From Anywhere

With the closure of many offices due to COVID-19, we want to make sure you are still able to access your Morningstar software. If you have any questions, or your product isn't listed here, please reach out to us at: <https://www.morningstar.com/company/global-contacts>. In good times and bad, we're committed to helping you empower investor success with great investment advice.

Morningstar Direct: Desktop Instructions

1. Go to <https://www.morningstar.com/products/direct/download>



2. Click "Download Direct Now"
3. Follow the instructions from your computer
4. Launch Morningstar Direct and login using the same credentials you use at the office.

Step-by-step download instructions are available at:

https://www.morningstar.com/content/dam/marketing/shared/pdfs/OS_DirectTechSpec.pdf.

Morningstar Direct: Web-Based Instructions

1. Go to <https://direct.morningstar.com> and select "Sign In"

The Morningstar Cloud
Investment analysis platforms designed for the way you work—built on Morningstar data and research.

Choose the Right Fit for Your Role

2. Enter your credentials.

MORNINGSTAR

Sign In

Email

Password

[Forgot your password?](#)

Do you have questions?
[Email our support team](#) or [view contact information.](#)

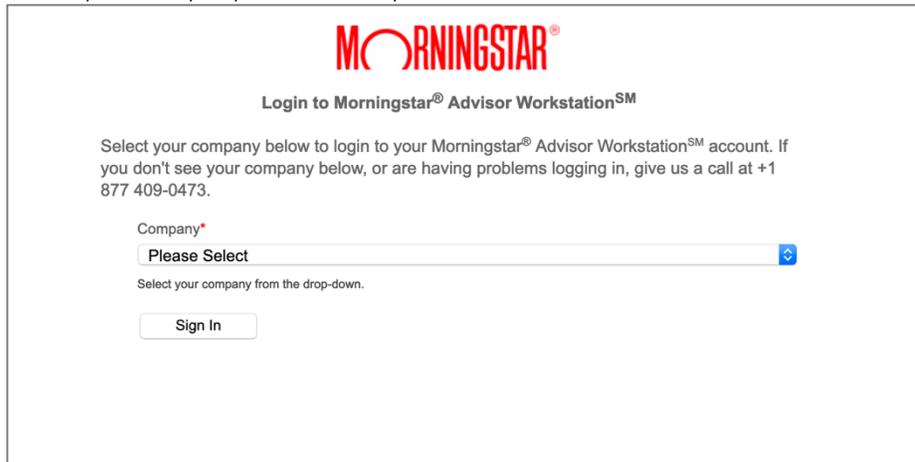
3. Need help? Contact the appropriate person here: <https://www.morningstar.com/company/global-contacts> or email: morningstardirectfeedback@morningstar.com to get help. .

Morningstar Advisor Workstation

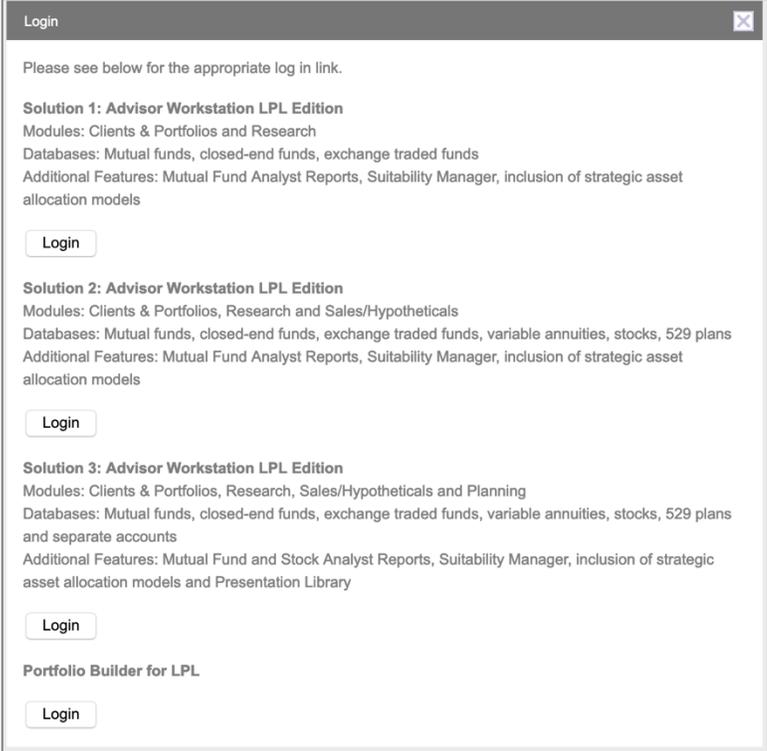
1. Go to <https://www.morningstar.com/products/advisor-workstation> and select "Sign In"



2. Select your company from the drop-down:

A screenshot of the Morningstar Advisor Workstation login page. The page features the Morningstar logo at the top center, followed by the heading "Login to Morningstar® Advisor Workstation™". Below this is a paragraph of text: "Select your company below to login to your Morningstar® Advisor Workstation™ account. If you don't see your company below, or are having problems logging in, give us a call at +1 877 409-0473." Below the text is a dropdown menu labeled "Company*" with the text "Please Select" and a blue arrow icon. Below the dropdown is a small instruction: "Select your company from the drop-down." At the bottom of the form is a "Sign In" button.

3. For companies with multiple versions of Morningstar Advisor Workstation, you will need to select the version to which you are subscribed.



The screenshot shows a 'Login' window with the following content:

Please see below for the appropriate log in link.

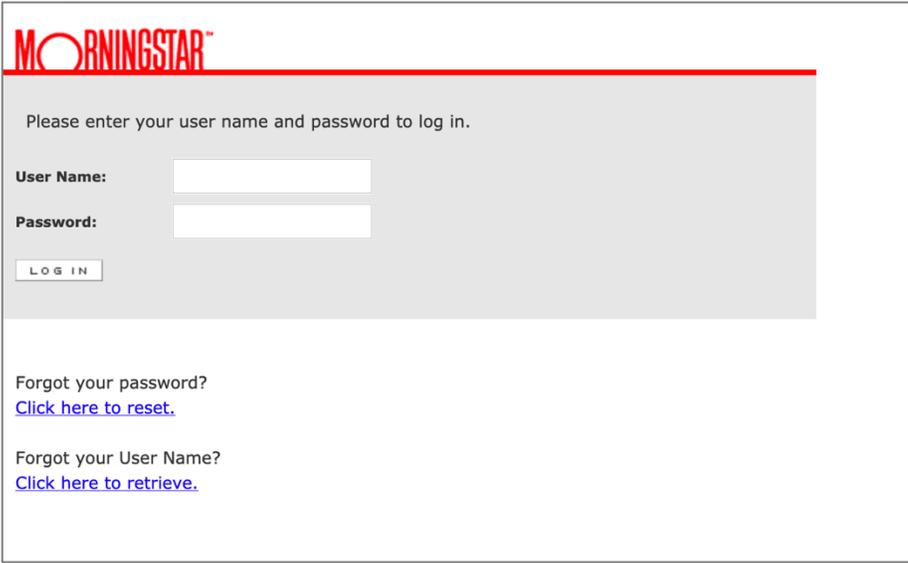
Solution 1: Advisor Workstation LPL Edition
Modules: Clients & Portfolios and Research
Databases: Mutual funds, closed-end funds, exchange traded funds
Additional Features: Mutual Fund Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models

Solution 2: Advisor Workstation LPL Edition
Modules: Clients & Portfolios, Research and Sales/Hypotheticals
Databases: Mutual funds, closed-end funds, exchange traded funds, variable annuities, stocks, 529 plans
Additional Features: Mutual Fund Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models

Solution 3: Advisor Workstation LPL Edition
Modules: Clients & Portfolios, Research, Sales/Hypotheticals and Planning
Databases: Mutual funds, closed-end funds, exchange traded funds, variable annuities, stocks, 529 plans and separate accounts
Additional Features: Mutual Fund and Stock Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models and Presentation Library

Portfolio Builder for LPL

4. Enter your credentials.



The screenshot shows the Morningstar login page with the following content:

MORNINGSTAR™

Please enter your user name and password to log in.

User Name:

Password:

Forgot your password?
[Click here to reset.](#)

Forgot your User Name?
[Click here to retrieve.](#)

5. Need help? Contact the appropriate line here: <https://www.morningstar.com/company/global-contacts> or email: USEnterpriseSupport-sc@morningstar.com to have a help ticket automatically created.

Morningstar Office

1. Go to <https://office.morningstar.com> and select “Sign In”



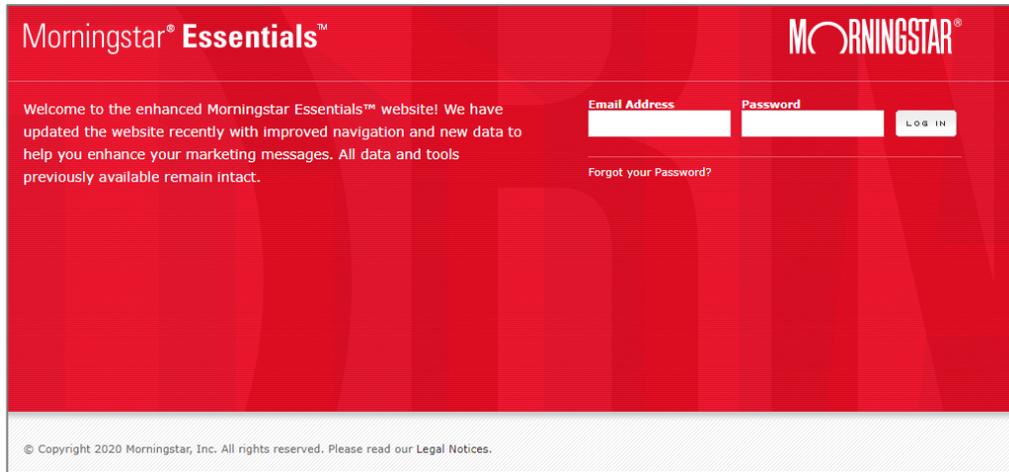
2. Enter your credentials.

The image shows the "Sign In" page of the Morningstar Office website. At the top, there is the Morningstar logo. The main heading is "Sign In" in a large, black, serif font. Below the heading, there are two input fields: "Email" and "Password". Each field has a red error message below it: "Please enter an email." and "Please enter a password." respectively. To the left of the "Password" field, there is a link that says "Forgot your password?". To the right of the "Password" field, there is a blue "Sign In" button. At the bottom of the page, there is a section for "Do you have questions?" with a link that says "Email us" and the text "or call (866) 215-2503 from 8a–6p CST, Mon–Fri."

3. Need help? Contact (866) 215-2503 from 8a–6p CST, Mon–Fri. or email: officequestions@morningstar.com to reach our support staff.

Morningstar Essentials

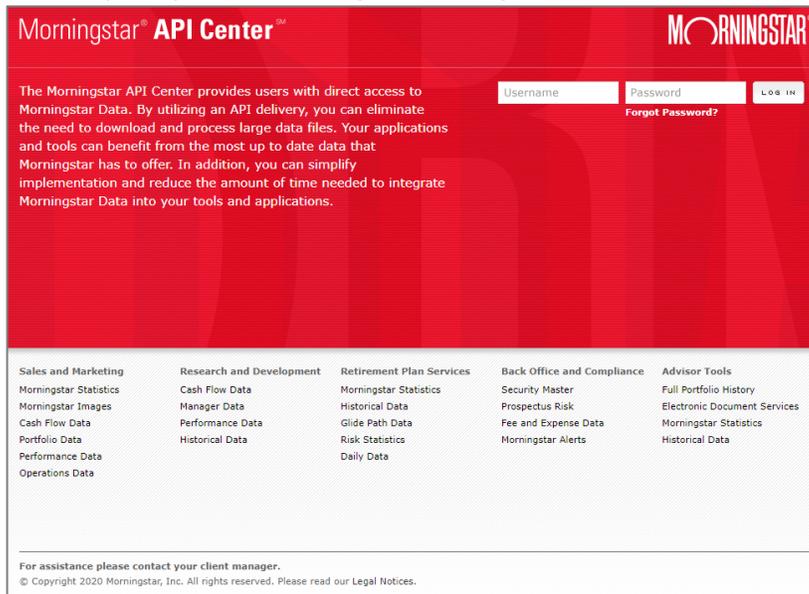
1. Go to <https://essentials.morningstar.com/>



2. Enter your credentials and click 'Log In'
3. Need help? Contact the Morningstar Licensed Data Support Team at licensedproducts@morningstar.com or (866) 608-9567 to get help.

Morningstar API Center

1. Go to <https://apicenter.morningstar.com/login>



Sales and Marketing	Research and Development	Retirement Plan Services	Back Office and Compliance	Advisor Tools
Morningstar Statistics	Cash Flow Data	Morningstar Statistics	Security Master	Full Portfolio History
Morningstar Images	Manager Data	Historical Data	Prospectus Risk	Electronic Document Services
Cash Flow Data	Performance Data	Glide Path Data	Fee and Expense Data	Morningstar Statistics
Portfolio Data	Historical Data	Risk Statistics	Morningstar Alerts	Historical Data
Performance Data		Daily Data		
Operations Data				

2. Enter your credentials and click 'Log In'
3. Need help? Contact the Morningstar Licensed Data Support Team at licensedproducts@morningstar.com or (866) 608-9567 to get help.