

Principia® News March 2012

Don't Miss the New Presentations and Education Update

The March release of the Principia Presentations and Education module is your first opportunity to see the year-end versions of our exclusive presentations. Featuring 23 presentations and three Sales Ideas, this all-in-one marketing tool is the easiest way to discuss today's most pressing financial topics, set appropriate investment expectations, and keep your brand top of mind with current and prospective clients. The new release includes a new presentation on exchange-traded funds that will help you explain these securities to your clients. For additional product information, please call 866 608-9571.

Upcoming Events in 2012

We have a few exclusive subscriber events coming up. With the launch of our new Morningstar Analyst Rating and the Global Fund Report, we are offering complimentary training sessions in our Chicago office. On Thursday, March 29th and Thursday, April 19th, Morningstar analysts will address the new Analyst Rating and Global Fund Report and changes to the Stewardship Grade methodology. Space is limited, so please call today to learn more about the agenda for these free classes and to secure your spot. In addition, we're also hosting our seventh annual Advisor User Forum on Wednesday, June 20th, followed immediately by the Morningstar Investment Conference, which continues through Friday, June 22nd. Early-bird pricing ends this month, don't miss out. To learn more, please call 866 215-2507.

Insurance Group Separate Accounts (IGSA) Now in Variable Annuities Universe

All IGSA data from the Separate Accounts (SA) Universe has been transferred to our Variable Annuities Advanced product. This switch allows us to provide improved data and reporting for these securities, as well as better representation of them within our Defined Contribution model reports. These securities are no longer included in the SA universe. If you need access to IGSA data, please call 866 215-2507 to receive the VA Advanced module.

Best regards,



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