

Principia® News May 2013

Upcoming Morningstar Events

Don't forget to register for the 8th annual Advisor User Forum. It is an exclusive event for our advisor subscribers and hosted at our Chicago headquarters and a great way for you to get one-on-one access to our product and analyst teams. To learn more about the sessions, [click here](#). In addition, the Morningstar Investment Conference immediately follows the Advisor User Forum, starting the afternoon of June 12 and ending June 14. With a focus on providing advisors with knowledge, insight, and resources, the conference brings the financial community's top minds together to discuss news, strategies, and tactics for investment professionals. To register for these upcoming events, call 866 839-9729.

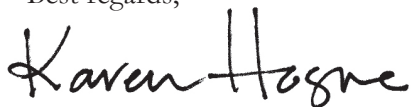
Morningstar Category Changes

Morningstar will be making changes to the U.S. Retail categories based on our observations of long-term changes in the market and how closely our categories reflect these changes in the market. In addition, we will also update the naming and mapping of our U.S. Broad Asset classes and Global Broad Asset classes to more accurately describe their constituents and align Morningstar category groupings globally. To learn more about these changes, please contact our Product Support team at 312 424-4288.

Principia Product Update

As we have mentioned in the last few client letters, we are starting to contact Principia customers as their subscriptions come up for renewal to let you know about some changes to our product line. Principia is one of our most successful products, and it has served the needs of advisors since the early 1990s. However, it is built on older technology that we will not be able to support in the future. We plan to begin migrating Principia customers to Morningstar Advisor Workstation Principia Edition, our web-based investment planning platform, or another Morningstar product that meets their needs. As your current subscription comes up for renewal, your Morningstar Sales Associate will reach out to give you more details and explain your options moving forward. If you want to talk to someone now, call us today and we can start to help you explore the best fit for your practice—800 698-5911.

Best regards,



Karen Hogue
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