

Principia® News June 2013

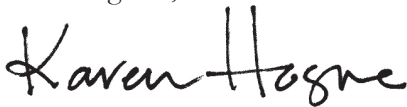
Presentations & Education Content Update

The Principia Presentations & Education module is a collection of FINRA-reviewed communication resources that translate complex investment topics into easy-to-understand graphics. Content added in July includes the following images: Benefits of Staying Invested Through Market Volatility, Playing Catch-Up, Tax Burden, The Best and Worst of Market Timing, and U.S. Stocks and Bonds Before and After Taxes. Additionally, our popular Real Estate Investing presentation has been updated with 2012 year-end data. This presentation explores the benefits of investing in real estate through an examination of three different segments: equity REITs, direct real estate, and global real estate. To learn more about these updates, call 866 608-9571.

Principia Product Update

We are starting to contact Principia customers as their subscriptions come up for renewal to inform them about some changes to our product line. Principia has served advisors since the early 1990s, and it's one of Morningstar's most successful products, but the platform was built using technology that we will not be able to support in the future. Therefore, 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. Your Morningstar Sales Associate will reach out when your current subscription comes up for renewal 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
Principia Product Manager
Morningstar, Inc.