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Principia® News

Important Information Regarding Your Morningstar® Principia® Subscription

As you are aware, we are in the process of migrating Morningstar Principia clients to other Morningstar products. Principia has served the needs of advisors since the early 1990s; however, it is built on older technology that we may not be able to support in the future.

Your July Principia disc update will be the last one you will receive in the mail. If you are still an active Principia subscriber, you will receive subsequent monthly updates via eDelivery until January 31, 2015. After that, we will extend the quarterly eDelivery updates of Principia, as long as it is feasible, for clients who transition to Morningstar Advisor Workstation and would like to use Principia alongside their active Advisor Workstation subscription.

To assist with your transition, we are offering more training opportunities so you can better map your current workflows from Principia within Morningstar Advisor Workstation. We've also added additional support resources to help you feel comfortable working within Advisor Workstation. And we have our product team working closely with our training representatives to ensure the most-utilized Principia functions are addressed in Advisor Workstation.

We know transitions are tough and appreciate your patience and loyalty. We apologize for any frustration this transition may be causing you, and want to alleviate any concerns you may have.

Please call us at +1 800 698-5875 to discuss your options.

Best regards,
The Morningstar Principia Team