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Principia Product Line Changes

As your Principia subscription comes up for renewal, we will reach out to update you about our plans to sunset the desktop version of Principia. Principia was built on older technology that has become increasingly difficult to update and support, so we have started moving our clients to Morningstar Advisor Workstation and other Morningstar products, depending on the capabilities they require. This year, you will have the option to renew to Principia eDelivery or another one of our products. Next year, we will be renewing everyone to one of our other offerings. To assist you with this transition, we have created training materials aimed at helping you reproduce many of the Principia workflows you use today in our Advisor Workstation product.

We understand that this type of change can be disruptive to your business, and we are here to work with you and explore your options. We will contact you a couple of months before your current subscription expires, but if you want to talk before then, please call us at 800 698-5911.

Thank you for your loyalty and business over the years. We are committed to helping you make this transition as easy as possible and find the best fit for your practice.

Best regards,

A handwritten signature in black ink that reads "Karen Hogue". The signature is written in a cursive, flowing style.

Karen Hogue
Principia Product Manager
Morningstar, Inc.