



## Making the Switch to Morningstar Office

“We’d recommend Morningstar Office—without question—to other independents who are thinking about switching portfolio management systems.”

### Looking for Results

At Strategic Investment Advisors, our charge is to help families make excellent financial decisions, and execute the task of investment management with discipline, emotional intelligence, and integrity, with real impact on peoples’ financial lives. We implement, and constantly monitor, the best investing choices our clients can make to improve their comfort and lifestyle.

There are two basic disciplines that we have long believed in: 1. Strategic Management: carefully defined and detailed plans to achieve long-term goals, and 2. Tactical Management: methods or techniques used to achieve short-term goals. To begin with the end in mind is essential, and delivering for our investors is important to us. As Winston Churchill said, “No matter how great the strategy, occasionally one need look at the result.”

### Switching to Morningstar Office

We were looking for a seamless integration of all of our past performance and cost basis data to a system we could use efficiently, simply, and with real impact in our communications with clients. Our previous experience with Morningstar gave us the confidence that they could deliver on their promises. That’s something we pride ourselves on and require in our strategic partnerships.

### Working Smartly and Efficiently

We enjoy the access, speed, utility, and robust nature of the program. While conducting virtual meetings with clients, we use Morningstar Office to easily drill as deep as is helpful in communicating the characteristics of portfolio positions. We can easily pull up client reports of any vein, from the Snapshot to Cost Basis to very sophisticated analysis of both what they have and exactly how they are doing versus the field. We can help our clients see the forest *and* the trees.

### Complete Back Office Support

Morningstar Office is very user friendly and intuitive. And when you need help, Morningstar professionals are readily available. For example, we received an e-mail from the Morningstar Back Office Services group regarding an issue with the accrued interest on a bond. Accrued interest wasn’t being reflected in the up-to-the-minute performance screens because the bond’s security details weren’t completely entered. The person from the Back Office group walked us through fixing the issue so that we could understand the process—and then they proceeded to handle it.

It feels like the Back Office group is part of the team. They are easy to contact and deliver great support over the phone, and they are always willing to do a quick online meeting when it’s useful for both of us to see the same screen. Overall, we’ve been very pleased, and when we see the need for the rare adjustment, the Back Office support team is on it.

### Recommended for Other Independents

We love the ability—on a moment’s notice—to evaluate client performance and allocation data for real client impact. We’re also looking forward to using the Client Web Portal for sharing reports via our Web site/client login. This is first-rate stuff.

Our experience has been that Morningstar Office continuously evolves with enhancements that we find useful, and we’ve found that Morningstar is very responsive to client requests for improvements. We’d recommend Morningstar Office—without question—to other independents who are thinking about switching portfolio management systems. ■■■

To learn more about Morningstar Office, call 866 685-4494 or visit [global.morningstar.com/Office](http://global.morningstar.com/Office)