

**Morningstar®
Advisor Workstation
RBC Correspondent
Services Edition**

**Morningstar®
Principia**

Overview	How to access	Internet	CD
	How to purchase	Call Morningstar at 888-445-6542	Call Morningstar at 888-445-6542
	Technical Support for Correspondents	Included in package price	Included
	Training	Virtual Training Center Included	Available for a nominal fee
About the Data	Data Updates	Daily and Intra-day	Monthly and Quarterly
	Research Universes -- Mutual Funds, Stocks, VA/Ls, ETFs, Closed-End Funds, Separate Accounts	All included. (Separate Accounts is available in Solution #2)	Available as individually purchased CDs
Research Capability	Screen and Rank	On over 250+ datapoints	On over 250+ datapoints
	Benchmarks	155+	200
	Quicktake Reports	Included	Included
	Investment Detail Reports	Included	Included
	Graphs*	Included	Included
	Analyst Reports	Not included	Mutual Funds and Stocks Advanced Modules
Portfolio Diagnostics	Portfolio Snapshot Report	Included	Included
	Portfolio X-Ray Report	Included	Not available
	Stock Intersection Report	Included	Included
	Portfolio Comparison Report	Included	Not available
Proposal and Sales Tools	Individual Hypothetical Illustrations	Included	Available with Hypotheticals CD
	Comparison Hypothetical Illustrations	Included	Available with Hypotheticals CD
	Portfolio Hypothetical Illustrations	Included	Available with Hypotheticals CD
	Presentation Library	Included	Not available
Portfolio Management	Client Management Portal	Included	Not available
	Portfolio Import	Included	Included
	Portfolio Construction	Included	Not available
	Security Alert Updates	Daily	Monthly or Quarterly
	Portfolio Alert Updates	Daily	Monthly or Quarterly
Planning Tools	Risk and Needs Questionnaire	Included	Not available
	Risk-based Model Portfolios	Included	Not available

*Investment Growth, Rolling Return, Risk/Reward Scatterplot, Total Annual Return and Correlation Matrix

**Includes Monthly Total Returns on indexes & funds, Category Report Binder with Morningstar Pages on historical category averages, historical performance tables for assets, expense ratios, income & capital gain payouts.