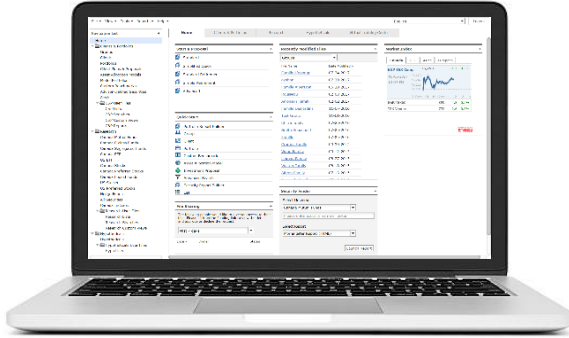


Morningstar Advisor Workstation Quickstart for New Users



Welcome to Morningstar Advisor Workstation!

Our software platform is built specifically around the workflows of financial advisors to help position and market products, construct portfolios, analyze investments, and connect with investors. Follow the steps below to help you get started.

Get Started!

1	Get an overview of Morningstar Advisor Workstation	View Guide	Watch Video
2	Use the Quick Start Guide to learn the key capabilities available within Advisor Workstation		View Guide
3	Learn how to build preferences in Advisor Workstation to save time and effort for the whole team		Watch Video
4	Use our Help menu to contact Morningstar Support		Watch Video
5	Learn how to set up client and prospect Portfolios		View Guide
6	Learn how to prepare for a client meeting in Research by Searching for investments and comparing investments through Reports and Graphs		View Guide
7	Learn how to save yourself time by building saved Searches, Lists, and Custom Views		View Guide
8	Learn how to use Hypotheticals to illustrate your best portfolio ideas		View Guide

Next Steps

Once you complete the above tasks and have a basic knowledge of Morningstar Advisor Workstation, be sure to check out other useful resources in the Virtual Training Center tab within Advisor Workstation.

