

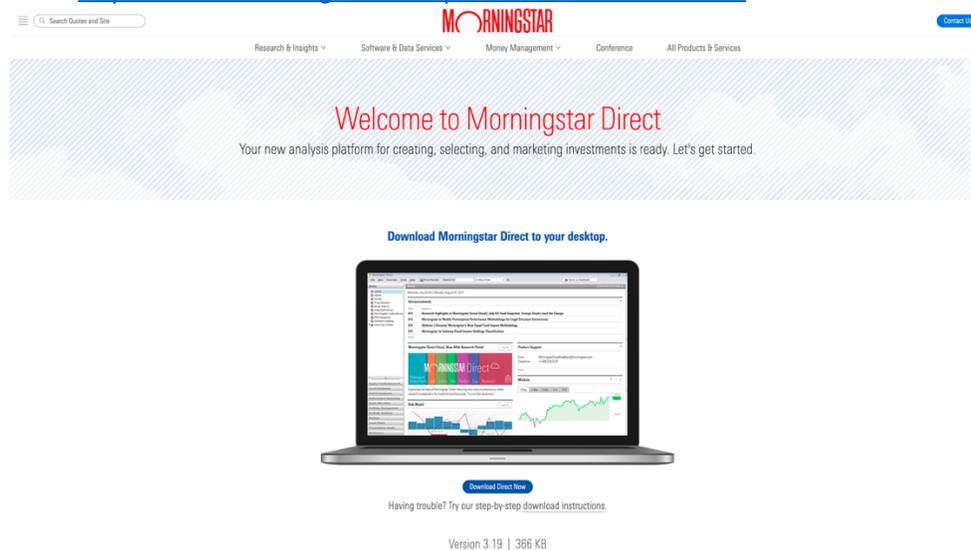
Access Morningstar Software From Anywhere

With the closure of many offices due to COVID-19, we want to make sure you are still able to access your Morningstar software. If you have any questions, or your product isn't listed here, please reach out to us at: <https://www.morningstar.com/company/global-contacts>. In good times and bad, we're committed to helping you empower investor success with great investment advice.

Morningstar Direct

Desktop Instructions

1. Go to <https://www.morningstar.com/products/direct/download>



2. Click "Download Direct Now"
3. Follow the instructions from your computer
4. Launch Morningstar Direct and login using the same credentials you use at the office.

Step-by-step download instructions are available at:

https://www.morningstar.com/content/dam/marketing/shared/pdfs/OS_DirectTechSpec.pdf.

Web-Based Instructions

- Go to <https://direct.morningstar.com> and select "Sign In"

The Morningstar Cloud
Investment analysis platforms designed for the way you work — built on Morningstar data and research.

Choose the Right Fit for Your Role

Icons representing: People, Finance, Documents, and Cookie Consent.

- Enter your credentials.

MORNINGSTAR

Sign In

Email

Password

[Forgot your password?](#) [Sign In](#)

Do you have questions?
[Email our support team](#) or [view contact information.](#)

- Need help? Contact the appropriate person here: <https://www.morningstar.com/company/global-contacts> or email: morningstardirectfeedback@morningstar.com to get help. .

Morningstar Advisor Workstation:

1. Go to <https://www.morningstar.com/products/advisor-workstation> and select "Sign In"



2. Select your company from the drop-down:

A screenshot of the Morningstar login page. At the top is the Morningstar logo. Below it is the heading "Login to Morningstar® Advisor Workstation™". A paragraph of text reads: "Select your company below to login to your Morningstar® Advisor Workstation™ account. If you don't see your company below, or are having problems logging in, give us a call at +1 877 409-0473." Below this text is a form with a label "Company*" and a dropdown menu. The dropdown menu currently displays "Please Select" and a blue arrow icon. Below the dropdown menu is the instruction "Select your company from the drop-down." and a "Sign In" button.

3. For companies with multiple versions of Morningstar Advisor Workstation, you will need to select the version to which you are subscribed.

Login

Please see below for the appropriate log in link.

Solution 1: Advisor Workstation LPL Edition
Modules: Clients & Portfolios and Research
Databases: Mutual funds, closed-end funds, exchange traded funds
Additional Features: Mutual Fund Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models

Login

Solution 2: Advisor Workstation LPL Edition
Modules: Clients & Portfolios, Research and Sales/Hypotheticals
Databases: Mutual funds, closed-end funds, exchange traded funds, variable annuities, stocks, 529 plans
Additional Features: Mutual Fund Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models

Login

Solution 3: Advisor Workstation LPL Edition
Modules: Clients & Portfolios, Research, Sales/Hypotheticals and Planning
Databases: Mutual funds, closed-end funds, exchange traded funds, variable annuities, stocks, 529 plans and separate accounts
Additional Features: Mutual Fund and Stock Analyst Reports, Suitability Manager, inclusion of strategic asset allocation models and Presentation Library

Login

Portfolio Builder for LPL

Login

4. Enter your credentials.

MORNINGSTAR™

Please enter your user name and password to log in.

User Name:

Password:

LOGIN

Forgot your password?

[Click here to reset.](#)

Forgot your User Name?

[Click here to retrieve.](#)

5. Need help? Contact the appropriate line here: <https://www.morningstar.com/company/global-contacts> or email: USEnterpriseSupport-sc@morningstar.com to have a help ticket automatically created.

Morningstar Office

1. Go to <https://office.morningstar.com> and select “Sign In”



2. Enter your credentials.

MORNINGSTAR

Sign In

Email

Please enter an email.

Password

Please enter a password.

[Forgot your password?](#)

Do you have questions?
[Email us](mailto:officequestions@morningstar.com) or call (866) 215-2503 from 8a–6p CST, Mon–Fri.

3. Need help? Contact (866) 215-2503 from 8a–6p CST, Mon–Fri. or email: officequestions@morningstar.com to reach our support staff.