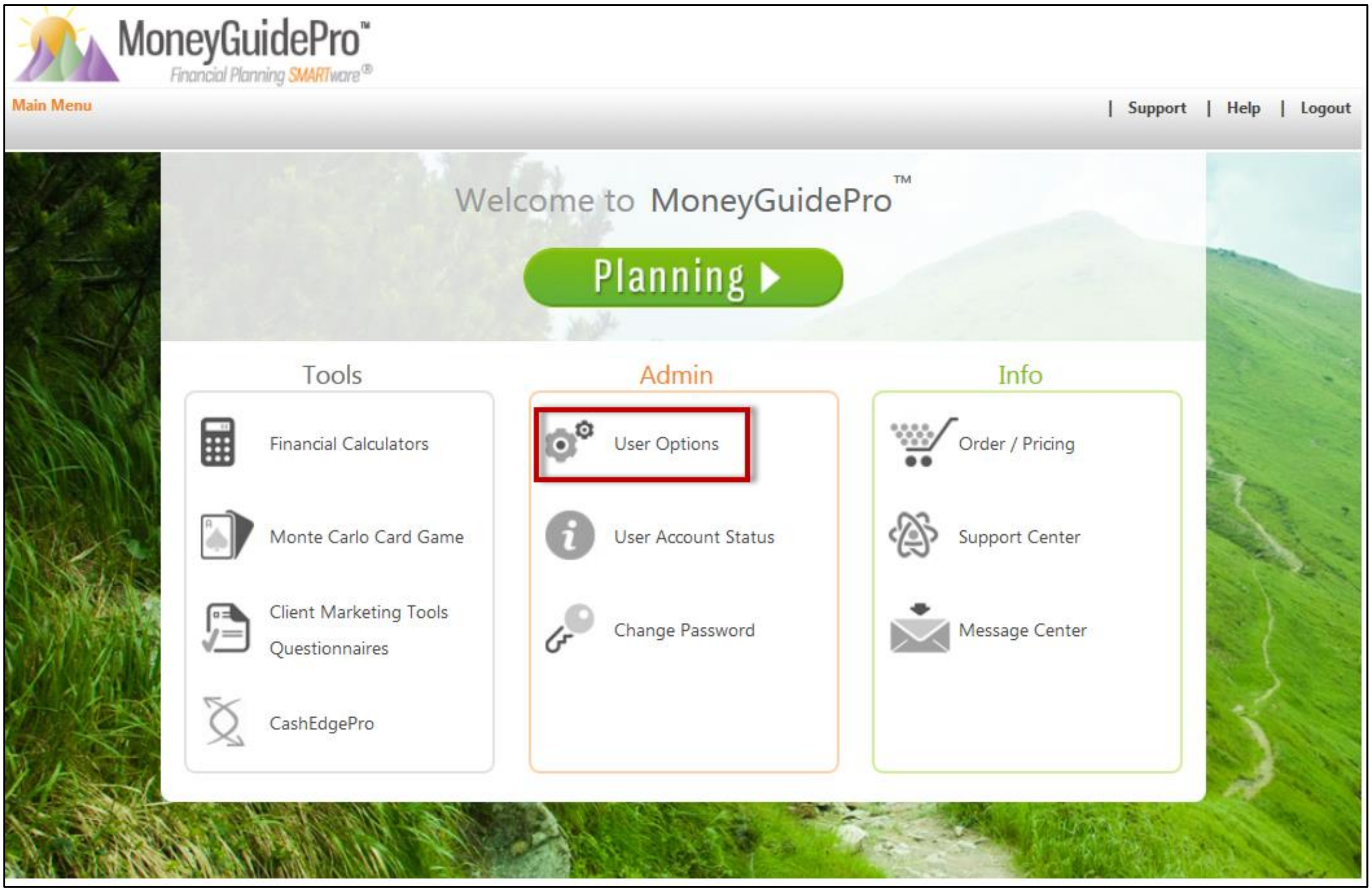
Integrating Morningstar Office with MoneyGuidePro

Step 1:

Login to MoneyGuidePro (MGP) and click “User Options” on the Main Menu.



Step 2:

Click “Partner Options” on the left menu and scroll down to the section for Morningstar Office. Verify that the radio button is set to “Yes” and then click “Add/Edit Morningstar Office Login.”

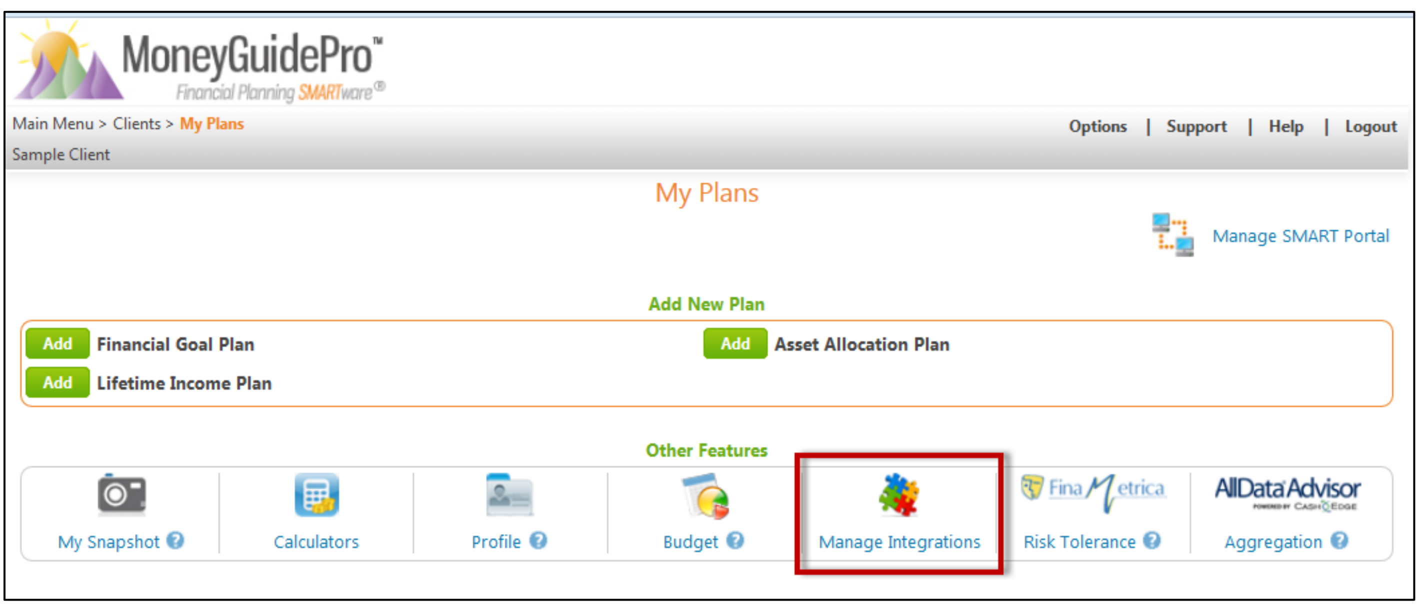
Add Screenshot of correct location

Step 3:

Enter in your Morningstar Office login credentials in the fields provided and click “Done.”

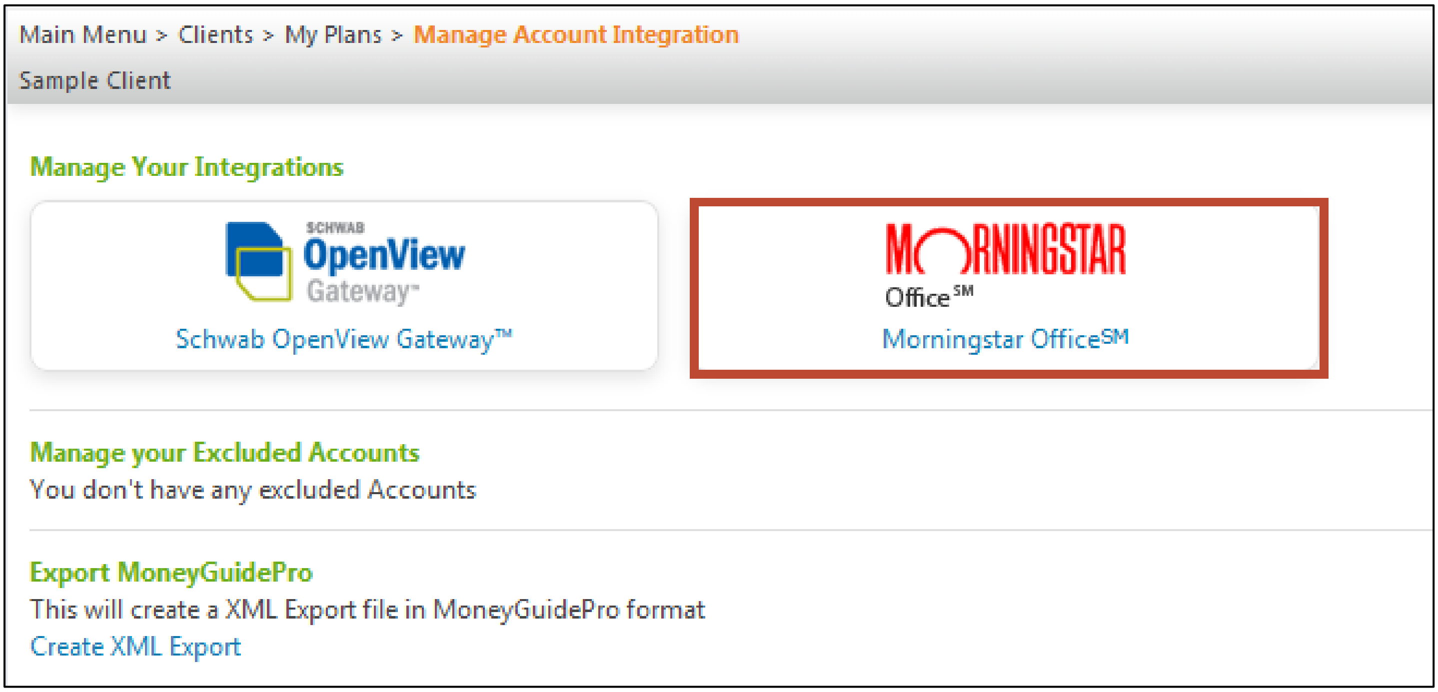
Step 4:

Go to the “My Plans” page for the client in MGP and click “Manage Integrations.”



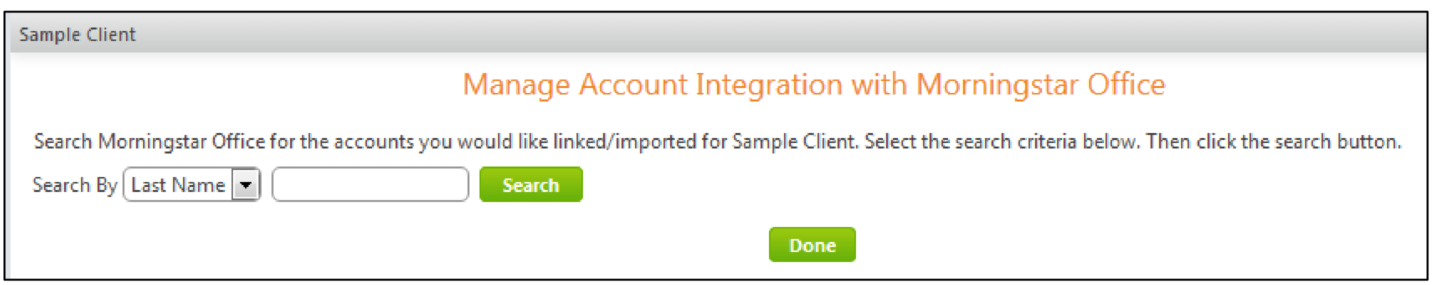
Step 5:

Select "Morningstar Office."



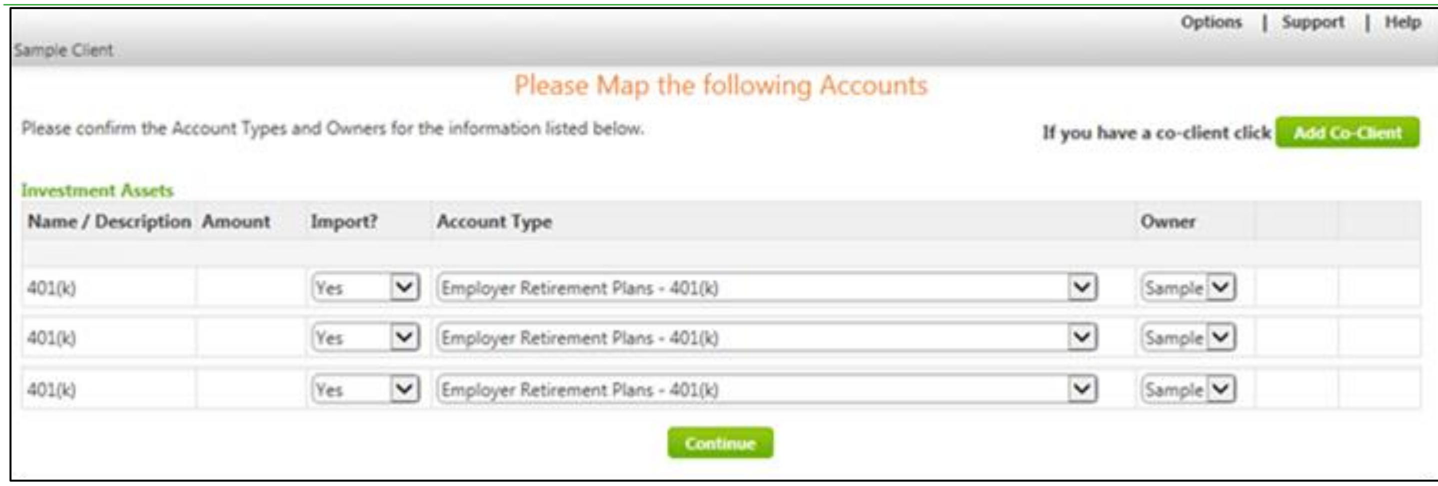
Step 6:

Enter the client's last name and click "Search." All available clients that meet the search criteria will be shown for you to select. After selecting the client(s) you want to import, click "Done."



Step 7:

Now simply map the imported account(s) by selecting the correct account owner and account type. After completing this process, select "Continue."


Options | Support | Help
Sample Client
Please Map the following Accounts
Please confirm the Account Types and Owners for the information listed below.
If you have a co-client click
Add Co-Client
Investment Assets
Name / Description
Amount
Import?
Account Type
Owner
401(k)
Yes
Employer Retirement Plans - 401(k)
Sample
401(k)
Yes
Employer Retirement Plans - 401(k)
Sample
401(k)
Yes
Employer Retirement Plans - 401(k)
Sample
Continue