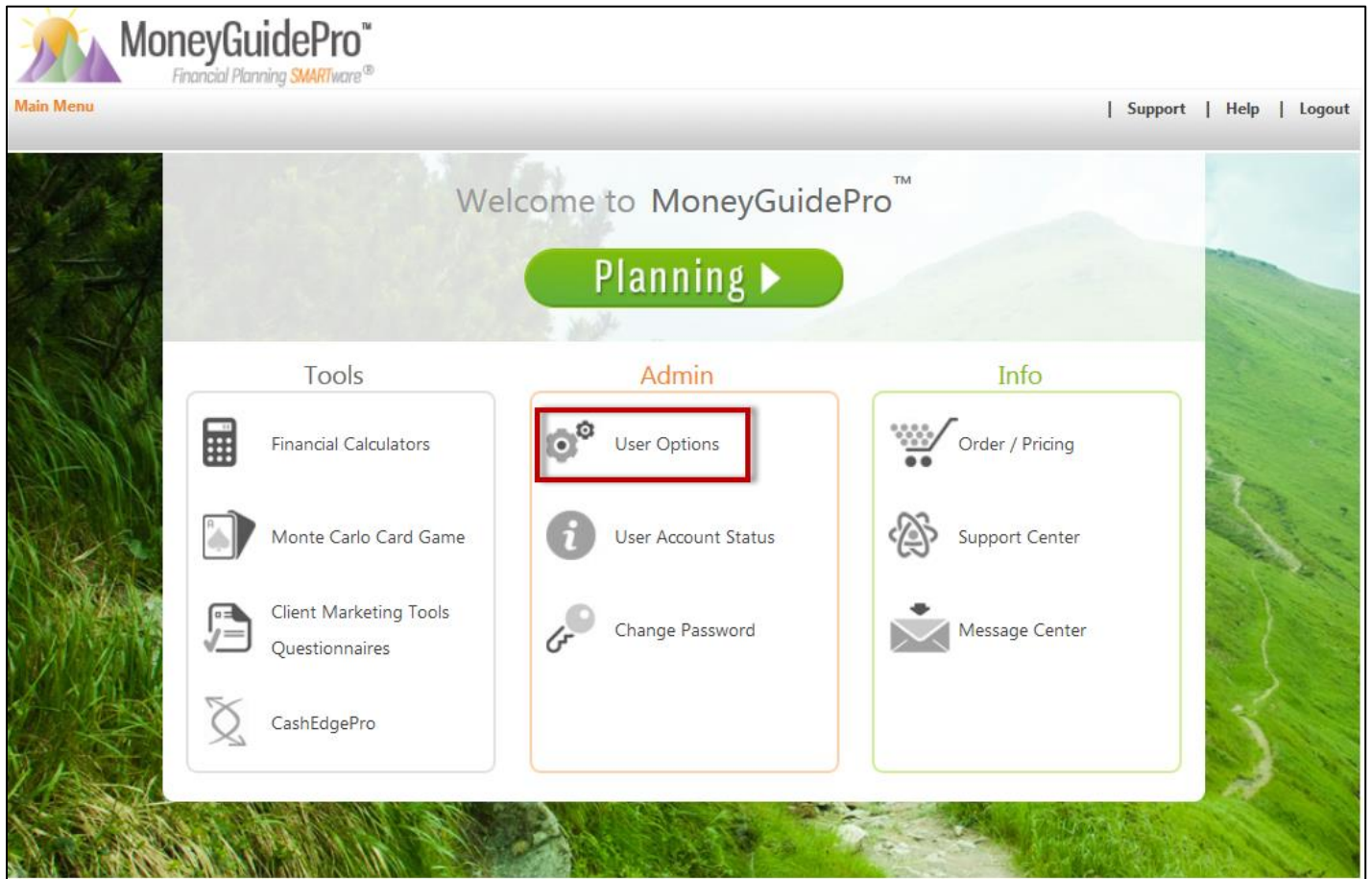


Integrating Morningstar Office with MoneyGuidePro

Step 1:

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



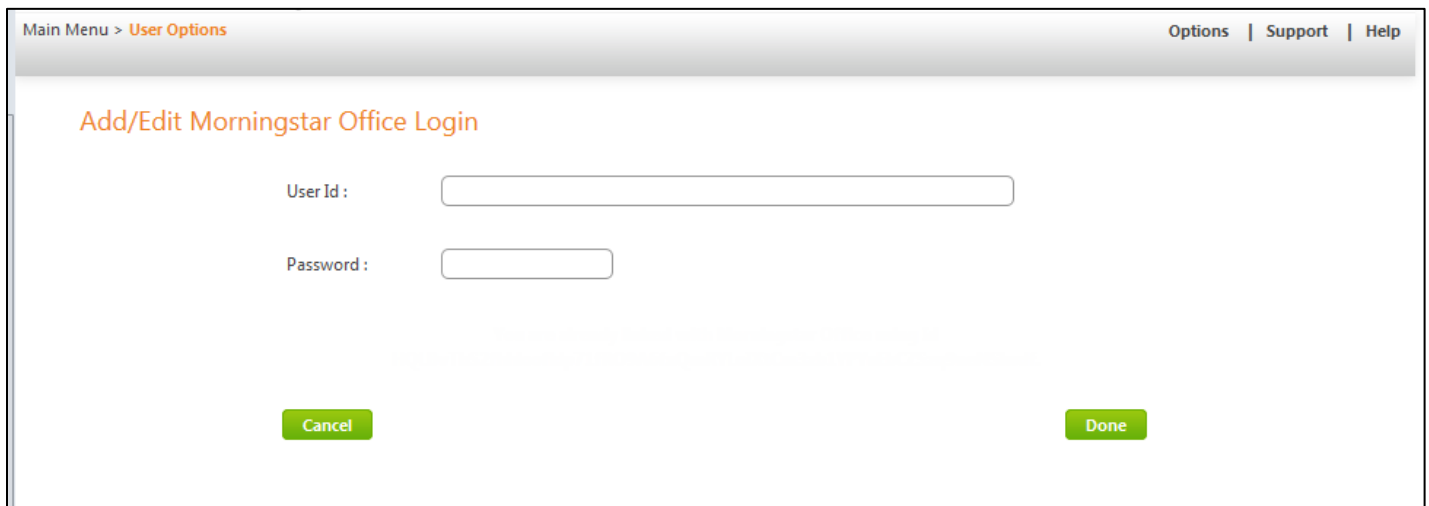
Step 2:

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:

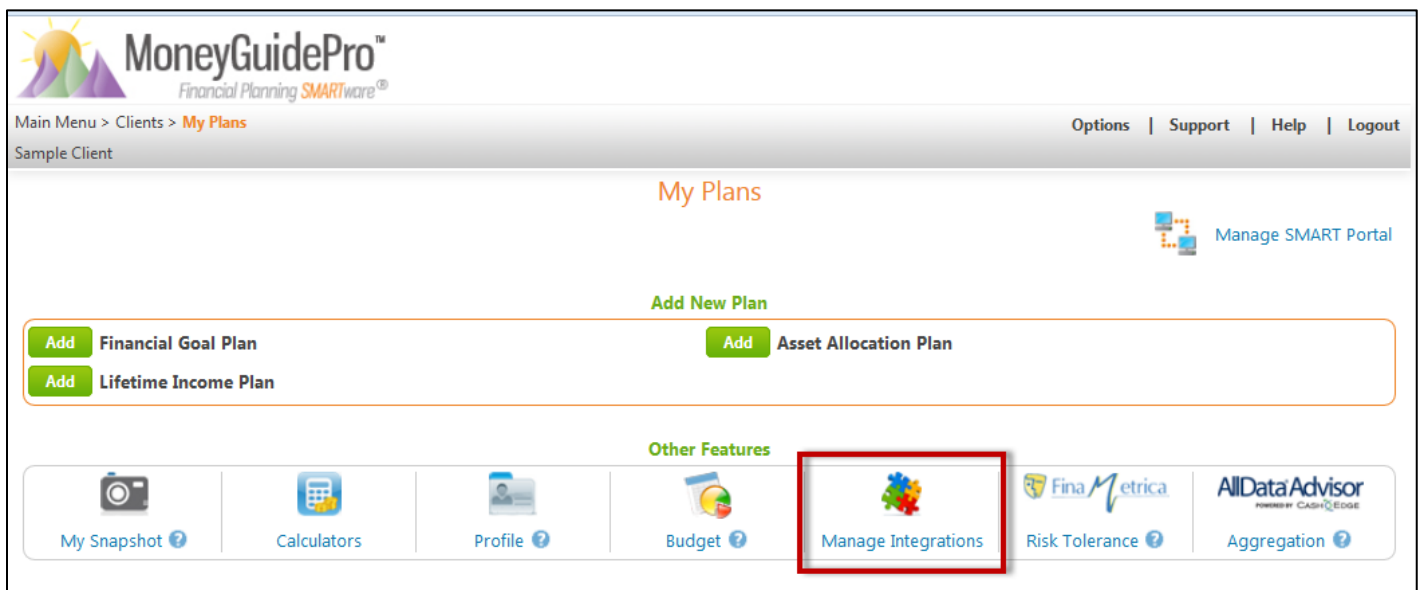
Enter in your Morningstar Office login credentials in the fields provided and click "Done."



The screenshot shows the 'Add/Edit Morningstar Office Login' form. At the top, there is a breadcrumb trail: 'Main Menu > User Options'. On the right, there are links for 'Options', 'Support', and 'Help'. The form has two input fields: 'User Id :' and 'Password :'. Below these fields are two green buttons: 'Cancel' and 'Done'.

Step 4:

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



The screenshot shows the 'My Plans' page. At the top, there is a breadcrumb trail: 'Main Menu > Clients > My Plans'. On the right, there are links for 'Options', 'Support', 'Help', and 'Logout'. Below the breadcrumb trail, there is a 'Sample Client' label. The main heading is 'My Plans'. To the right of the heading, there is a 'Manage SMART Portal' link. Below the heading, there is an 'Add New Plan' section with three buttons: 'Add Financial Goal Plan', 'Add Lifetime Income Plan', and 'Add Asset Allocation Plan'. At the bottom, there is an 'Other Features' section with seven icons and labels: 'My Snapshot', 'Calculators', 'Profile', 'Budget', 'Manage Integrations' (highlighted with a red box), 'Risk Tolerance', and 'Aggregation'.


Step 5:


Select "Morningstar Office."

Main Menu > Clients > My Plans > **Manage Account Integration**

Sample Client

Manage Your Integrations


Schwab OpenView Gateway™


Morningstar OfficeSM

Manage your Excluded Accounts
You don't have any excluded Accounts

Export MoneyGuidePro
This will create a XML Export file in MoneyGuidePro format
[Create XML Export](#)

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."

Sample Client

Manage Account Integration with Morningstar Office

Search Morningstar Office for the accounts you would like linked/imported for Sample Client. Select the search criteria below. Then click the search button.

Search By

Step 7:

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



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 <input type="button" value="v"/>	Employer Retirement Plans - 401(k) <input type="button" value="v"/>	Sample <input type="button" value="v"/>		
401(k)		Yes <input type="button" value="v"/>	Employer Retirement Plans - 401(k) <input type="button" value="v"/>	Sample <input type="button" value="v"/>		
401(k)		Yes <input type="button" value="v"/>	Employer Retirement Plans - 401(k) <input type="button" value="v"/>	Sample <input type="button" value="v"/>		

[Continue](#)