MORNINGSTAR Wealth

Partner with Your Platform

Award winning service for you, so you can focus on providing great service to your clients

Over 255,000 financial advisers around the world work with Morningstar.

Morningstar Wealth Platform takes care of the heavy lifting of administering investments on behalf of your clients, so you can focus on spending time with them; the aspect of your service we know they really value.

Market Leading Workflow and User Experience

We want to impress you with how easy it is to produce a client pack. From digital acceptance – that's right, no paper forms – to market leading application processing; client accounts and portfolios are quick and simple to establish.

Award Winning Service

From onboarding, to using the platform on a daily basis, we've built our business around making sure it's as seamless as possible. We hope you don't need to contact our support teams. But if you do, they're available around the clock. Dedicated staff will be on hand to assist with whatever you require support with.

Tried and Tested Technology, Investing in Continued Improvement

Owning our own technology means we can adapt as the advice landscape changes and develop as your needs evolve. Listening to you is key to determining where we spend our time. Robust feedback loops allow us to hear directly from you, efficiently turning insight into useable product features and enhancements.

Promote Your Business and Your Value Proposition

Don't let your platform steal your limelight. The whole experience can be customised in your brand. So you and your clients will experience a personalised version of the platform; from the logo and colours within the site to branded model names, to the paperwork and statements your share with your clients.

Client Engagement, Retention and Acquisition

Behavioural Science

Support to help keep your clients engaged in your financial plans and deepen trusted relationships.

Client-Friendly Content

Created specifically for you as well as curated from across Morningstar thought leaders to make communicating with your clients more efficient.

Practice Optimisation

Resources that deliver tools and support from across Morningstar to aid you in growing and running your practice.

An Investment Line Up Chosen by You

The extensive range of model portfolios cater for all risk profiles and investor preferences, available through a wide selection of investment managers. Investment managers on the platform are able to include direct equities, listed securities, managed funds, cash and bonds. And if there's anything you want that isn't there, let us know and we'll fill any gaps.

Through the platform you can invest a client's General Investment Account (GIA), Individual Savings Account (ISA) and Self-Invested Personal Pension (SIPP), as well as providing the ability to access third-party products (including onshore/offshore bonds and pensions), enabling a tailored solution for every kind of investor at any life stage.

Governance and Compliance Control and Oversight

The ability to tailor access levels for advisers and support staff, facilitating greater risk and compliance oversight over client, investment and advice activities. Our Report Builder gives you the power to access and analyse client and adviser data, enabling better business decisions.

Adviser firms with discretionary permissions can establish and manage their own model portfolios and create greater consistency and control of investment portfolio construction for their advisers.

Cost Effective for Your Business and Your Clients

We strive to minimise costs. Controlling costs helps investors build wealth by keeping more of what they earn. With Morningstar Wealth Platform's competitively priced custodial administration fees and trading charges, you have a cost-effective solution for all your clients.

Benefits for Your Clients

- ✔ Safeguards the custody of your clients investments.
- ✔ Easy to use investor portal provides transparency to your clients: up-to-date market valuations, additions and withdrawals, receive reports and statements electronically, do a deep dive into underlying holdings.
- ✔ Easy to setup regular contributions, ad-hoc withdrawals or adjustments and more.
- ✔ Due to ability to brand the whole experience in your brand, your clients engage only with your brand, not ours.
- ✔ Keep your clients' portfolios in line with your investment strategy.

Benefits for Your Business

- ✔ One integrated platform enables advisers to provide higher quality engagement, a differentiated service proposition across client segments & achieve significant business efficiencies.
- ✔ Configurable platform to work for your clients and your business.
- ✔ Adaptive, always improving technology you can rely on to solve operational challenges and make investing on behalf of your clients as efficient as possible.
- ✔ Support with regulatory and compliance obligations.
- ✔ Content, tools and resources to support your client engagements.

Contact Your Financial Adviser to Learn More

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