Morningstar Office Quickstart For New Advisors

Welcome to Morningstar Office!

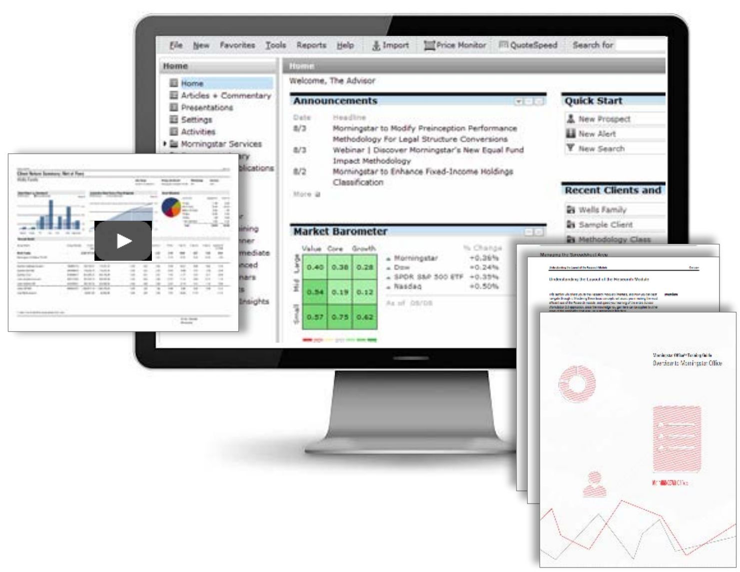
Morningstar Office is our complete practice and portfolio management system for independent financial advisors. It features robust portfolio management and performance reporting, advanced research capabilities, sophisticated investment planning, and secure communications using Client Web Portal. Follow the steps below to help you get started.

Get Started!

1	Get an **overview of Morningstar Office**	View Guide
2	Learn how to build an **Investment List** for competitive analysis, in-depth evaluations, and more	View Guide
3	Learn how to use **Searches** to screen for specific investments	View Guide
4	Setup your **Custom Views** to show a distinct arrangement of data points	View Guide

Next Steps

Now that you have the basic knowledge of Morningstar Office, be sure to check out other useful **resources** we have available for you!



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