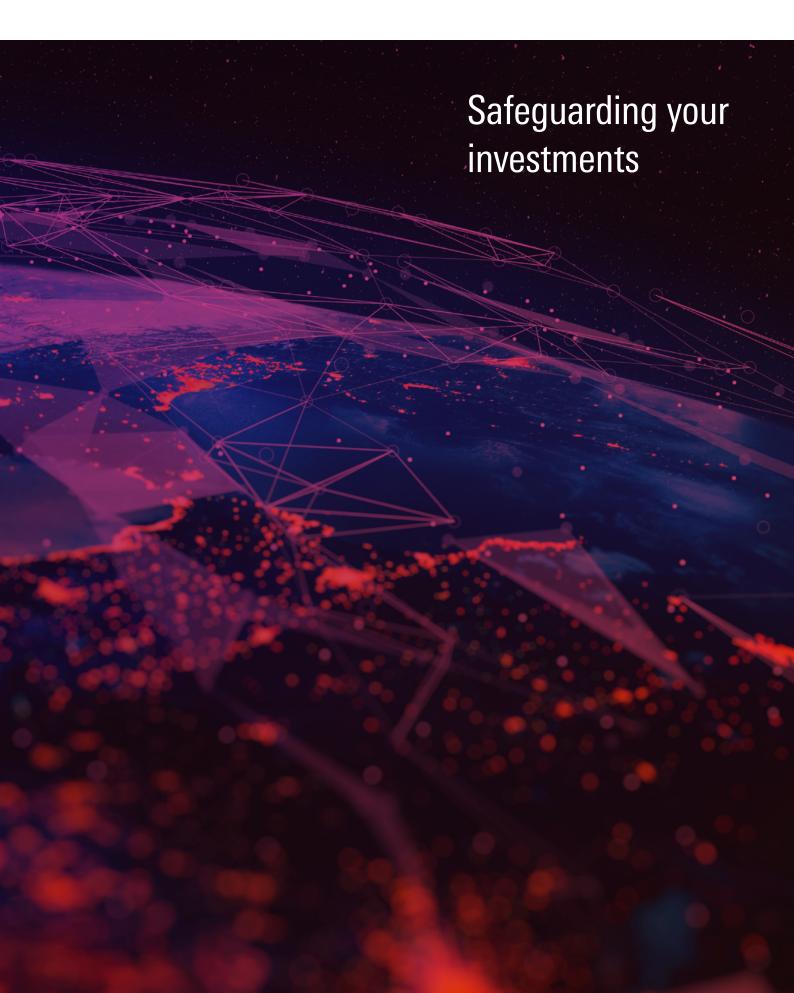
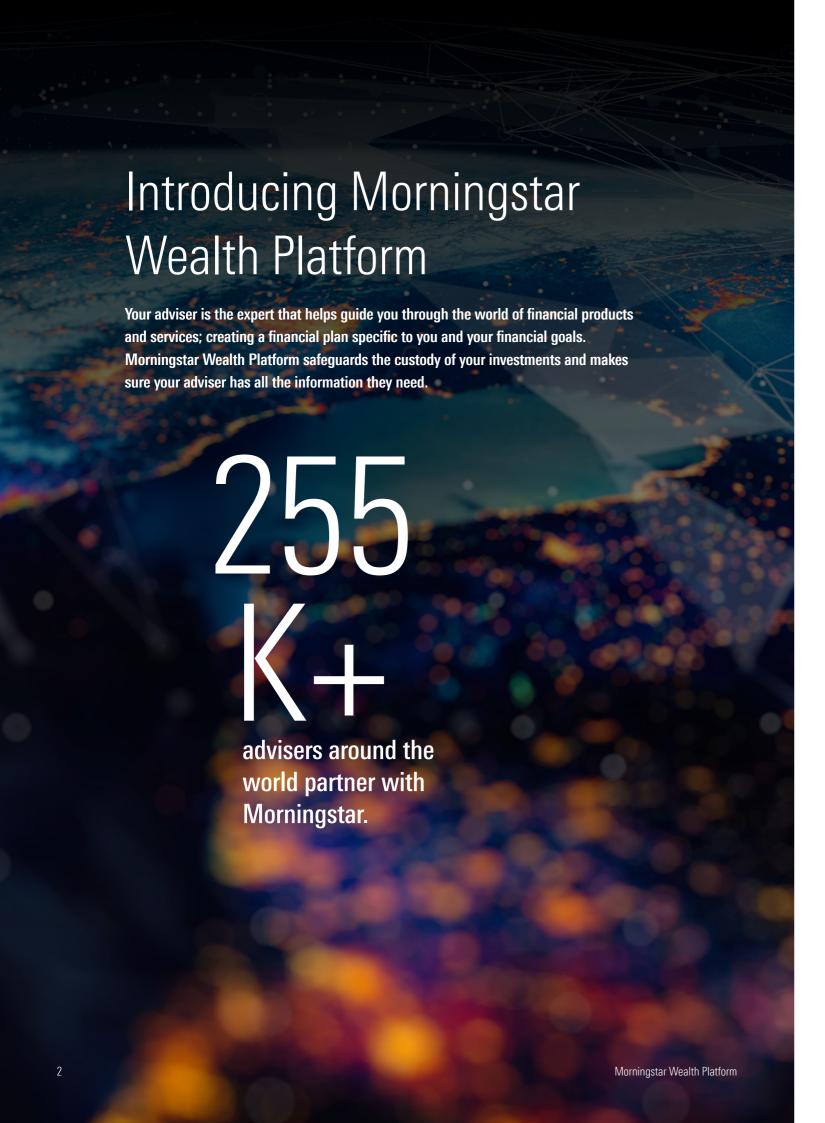
M RNINGSTAR Wealth Platform





Why your adviser chose Morningstar Wealth Platform

Morningstar Wealth Platform acts as your adviser's administration system. We handle all the investment processing so your adviser can create and manage your investment portfolio.

The platform allows all your investments to be held in the same place; this makes it easy for your adviser to monitor your portfolio and ensure it remains appropriate for your needs.

Easier administration

Because all of your investments are held in one place, administration is streamlined and simple.

Smarter investments engagement

Your adviser is able to manage your portfolio's ongoing needs through the Adviser Portal, which provides comprehensive oversight and enables setup of regular contributions, ad-hoc withdrawals or adjustments and more.

Security of investments

The safe custody of your investments is essential for your peace of mind. We partner with some of the world's most prestigious and reputable financial institutions to provide the security you and your adviser expect.

Our custodial services are governed by FCA regulations on Client Money and Assets and provided with companies like Northern Trust (Guernsey) Ltd, FNZ and HSBC.

Working together for you

Your adviser works with you to determine your investment goals and your tolerance for risk, then agrees with you the most effective strategy to achieve your goals.

Your investment manager is the expert who chooses the investments that will best align to your investment strategy to achieve your financial goals. They monitor the performance of your investment portfolio on an ongoing basis.

Morningstar Wealth Platform safeguards your investments by holding custody of your assets, and efficiently administers your portfolio and executes trades on your behalf. Our platform helps keep your portfolio in line with your investment strategy.

M RNINGSTAR Wealth Platform

©2023 Morningstar. All Rights Reserved. The Morningstar name and logo are registered trademarks of Morningstar, Inc. This email includes proprietary materials of Morningstar. Reproduction, transcription, or other use, by any means, in whole or in part, without the prior written consent of Morningstar is prohibited. This email does not constitute investment, legal, tax or other advice and is supplied for information purposes only. The information, data, analyses, and opinions presented herein are provided as of the date written and are subject to change without notice. Every effort has been made to ensure the accuracy of the information provided, but Morningstar Wealth Administration Limited and Morningstar Wealth Retirement Services Limited makes no warranty, express or implied regarding such information. The information presented herein will be deemed to be superseded by any subsequent versions of this email and is solely intended for regulated financial advisers and Professional Clients and is not intended for Retail Clients. Morningstar Wealth Administration Limited and Morningstar Wealth Retirement Services Limited are authorised and regulated by the UK Financial Conduct Authority. Registered Office: 1 Oliver's Yard, 55-71 City Road, London EC1Y 1HQ.