

MORNINGSTAR Wealth Platform

Safeguarding your
investments



Introducing Morningstar Wealth Platform

Your adviser is the expert that helps guide you through the world of financial products and services; creating a financial plan specific to you and your financial goals.

Morningstar Wealth Platform safeguards the custody of your investments and makes sure your adviser has all the information they need.

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advisers around the world partner with Morningstar.

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.

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