



Morningstar Advisor Workstation Legent Clearing Edition Now Available

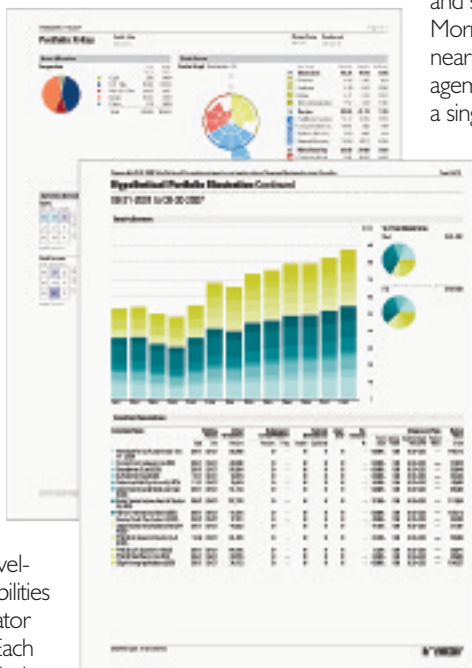
Legent Clearing has partnered with Morningstar to provide tools advisors need to enhance their investment strategies and power their sales presentations. Morningstar's software offerings are designed to maximize efficiency and make it as easy as possible to share the results of investment research, leaving advisors more time to focus on serving clients and prospects. Financial professionals clearing through Legent can now rely on Morningstar's expertise with the following products:

Advisor Workstation is Morningstar's web-based platform that has been customized specifically for advisors clearing through Legent. Advisor Workstation is built around four core modules that deliver Morningstar's full breadth of investment research, screening capabilities, portfolio analysis and construction tools, client presentation and report development, and planning capabilities such as Monte Carlo simulator and risk assessment tools. Each module works together to help advisors tackle any situation- client reviews, new client pitches, pinpointing trouble areas within an initial portfolio, and ongoing portfolio monitoring and maintenance.

Recently, Boomer Market Advisor asked readers, "What technology platform is the most effective at helping you increase revenue and decrease costs?" The winner, for the second year in a row, was Morningstar Advisor Workstation. Boomer Market Advisor wrote, "It's a hit with our readers and more than one claimed it's rapidly becoming a standard for financial planning software."

Morningstar Office

Morningstar Office is a single, all-inclusive platform designed for advisors to run their entire practice. It features all of the capabilities of Advisor Workstation and more – investment research, financial planning, portfolio management and relationship management, combined into a integrated application that eliminates redundant data entry and streamlines workflow. Morningstar Office meets nearly every practice management of an advisor within a single system.



Principia

Principia is Morningstar's CD/DVD software suite available as individual research databases and specialized modules with which advisors can conduct research and analysis, monitor portfolios and propose investment strategies.

With Principia, advisor can use a single module to research a specific investment type or combine

modules to build and manage multi-asset type portfolios. Monthly or quarterly updates keep the data as timely as desired. Specialized modules complement the database modules to complete focused tasks, such as Hypotheticals for portfolio back-testing and Defined Contribution Plans for building and monitoring retirement plan lineups.

Analytics

Analytics allows users to run selected Morningstar reports through limited investment research databases.

FINRA-Reviewed Morningstar Reports

Morningstar software offers various FINRA-reviewed report outputs that are carefully designed to help advisors deliver information to clients clearly, quickly and efficiently. Morningstar reports help advisors present at-a-glance portfolio synopses, reinforce recommendations, and explain investment performance.

Some of Morningstar's most popular reports are: **Portfolio Snapshot** - provides an overall picture of how a client's investments are performing.

Portfolio Comparison - ideal for new client situations and allows an intelligent discussion of the differences between a client's current portfolio and a proposed investment strategy, with explicit side-by-side comparisons.

Stock IntersectionSM - reveals clients' overall exposure to individual equities in the underlying holdings of their portfolios.

Investment Detail - provides the necessary investment-level detail needed to support specific advisor recommendations.

For More Information

For more information on the above products, to receive free trials or sign up for web demonstrations, please call Morningstar at 866-546-9165 or visit advisor.morningstar.com/goto/legentclearing.

FREE TRIAL

To sign up for a free trial of Morningstar Advisor Workstation, Legent Clearing edition, go to advisor.morningstar.com/goto/legentclearing and click on the tab "Trial" at the top of the page.

Morningstar Relationship Managers host monthly web casts for investment professionals eager to learn more about Advisor Workstation. View a web cast to see how Advisor Workstation can help you conduct investment research, construct and monitor portfolios, create presentations and reports, and generate hypothetical investment illustrations.

For more information please contact us:

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