

Morningstar Australasia

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BFP Member Benefit & Special Pricing Arrangement

Business Name

Morningstar Australasia Pty Ltd

Website: <https://www.morningstar.com/en-au/company>

Synopsis of Business

Morningstar Australasia is a subsidiary of Morningstar, Inc., a leading provider of independent investment research in North America, Europe, Australia, and Asia. Morningstar offers globally an extensive line of products and services for individual investors, financial advisers, asset managers, retirement plan providers and sponsors, and institutional investors in the private capital markets. Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly listed companies, private capital markets, and real-time global market data. Morningstar also offers investment management services through its investment advisory subsidiaries, with about \$217 billion in assets under advisement and management as of Sept. 30, 2019. The company has operations in 27 countries. For more information, visit www.morningstar.com/company. Follow Morningstar on Twitter @MorningstarInc

Product/Service Description

Morningstar® Adviser Research Centre™ (ARC) is a web portal for advisers that provides access to the latest Morningstar investment research (funds, equities, ETFs, LICs and Credit), data, market reports, and tools to help advisers make investment decisions and communicate confidently around investments with their clients.

Advisers use this portal to research and identify appropriate investments and make portfolio recommendations. Morningstar supports integration with XPLAN, COIN and its own planning software, AdviserLogic. For more information on Adviser Research Centre Click Here - <https://arc.morningstarhub.com.au/>

AdviserLogic is Morningstar's financial planning software solution that comprises core CRM features with cashflow modelling, financial planning, digital SoA generation and research tools, and integrates data feeds and external applications. Optional head office solutions provide licensees with reporting solutions, network oversight, revenue management and more. For more information on AdviserLogic Click Here - <https://www.morningstar.com/en-au/products/adviserlogic>

Morningstar Direct is a global flagship product that combines data and research with custom analytics and reporting all into one powerful tool. Core functions of Direct are APL management (performance reporting), portfolio management, attribution analysis, portfolio construction (asset allocation), internal and external communication (Presentation Studio), ESG and sustainability. For more information on DIRECT Click Here - <https://go.morningstar.com/direct-for-advisers>

BFP Pricing Arrangement

To learn more about our new Preferred Partner Package for **Boutique Financial Planner** members and our enhanced **Adviser Research Centre (ARC)** service, or any of the Morningstar Services mentioned above, please feel free to contact us today. We are more than happy to arrange a time to walk you through a live demonstration of the services, as well as determine the best pricing package to suit your specific practice needs.

We look forward to hearing from you soon!

Pricing is based upon the solution, size of an AFSL and number of advisers. Morningstar has existing relationships with several AFSL holders where preferential/preferred partner pricing may already be in place. Please contact Morningstar for more information.

Process to Access Offer

Please Click Here - <https://go.morningstar.com/arc-bfp> or contact Luca Casgrain (details below)

Business Representative Details

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