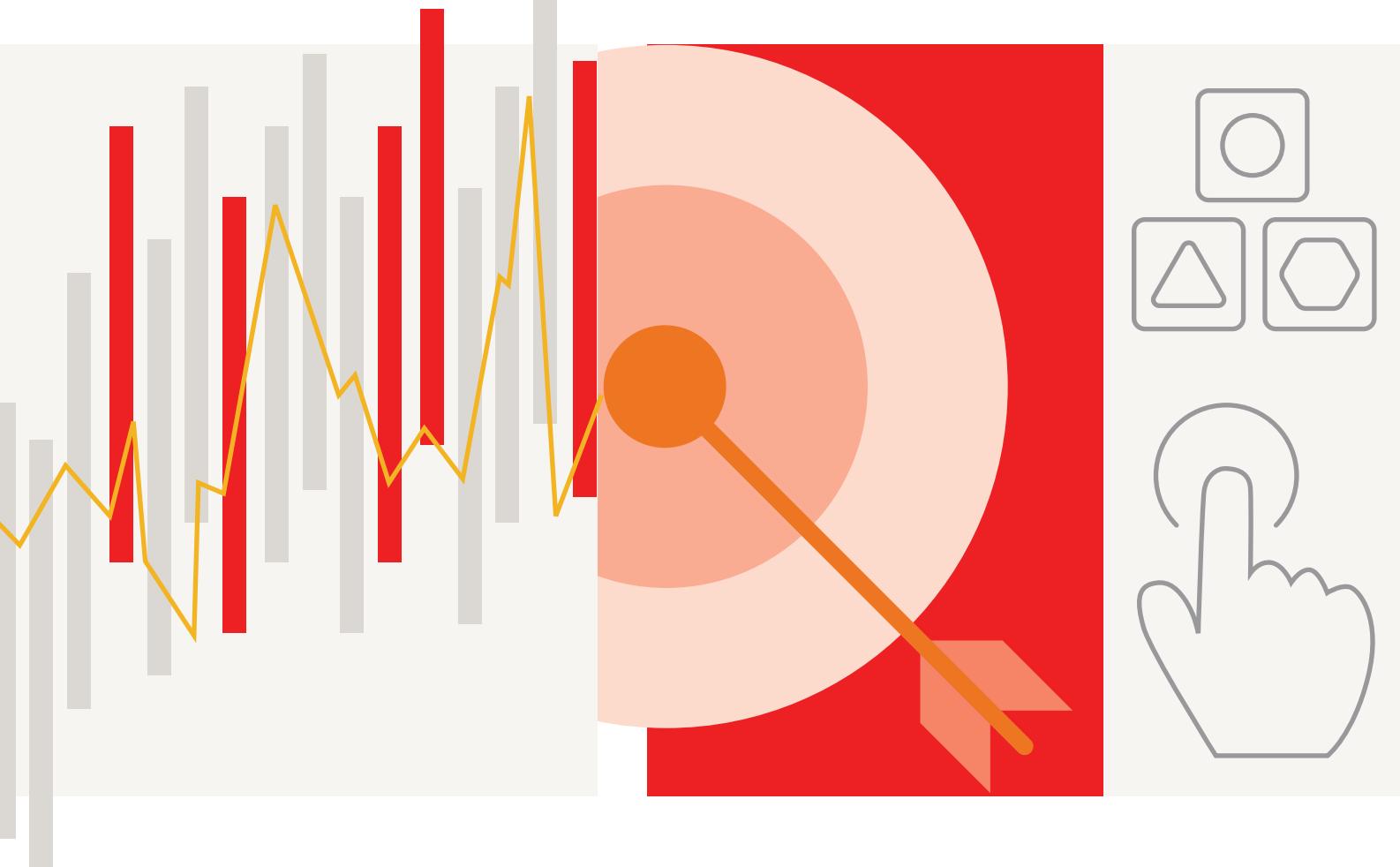


Wealthcraft

An end-to-end advice software solution

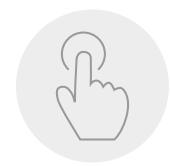


Its modular make up means Wealthcraft can provide full end-to-end business support or at specific points in the advice journey. It can grow and flex over time.

Wealthcraft securely houses your data, drives your advice process, supports your regulatory obligations, and shapes your clients' experiences. Turning data into insight, Wealthcraft enables you to get the most of your time and your business.

Benefits for your business

Your choice:



An end to end solution

Back office, portfolio analytics, investment research, financial personality, and risk profiling.

or



A modular solution

If you want to pair with other providers or use as a standalone.

Secure data management:

Wealthcraft securely houses your data, drives your advice process, supports your regulatory obligations, and shapes your clients' experiences. By turning data into insight, Wealthcraft enables you to maximize your time and business efficiency.

Peace of mind and efficiency:

Benefit from market-leading data security and efficiencies through Office 360 suite integration.

Flexible access:

Continuous upgrades and no downloads required due to Wealthcraft being a cloud-based solution. Access the system from any location and any device.

Partner integration: Work with the partners you choose, thanks to our market-leading integrations with external capabilities such as CashCalc and FE, and internal solutions like Finametrica.

Real value: Enjoy an intuitive and slick user experience, with access to our Wealthcraft consultancy service and ongoing customer support to help you get the most out of it.

Demonstrate the value you add: with tools and a service proposition that support your client relationships.

Solution overview

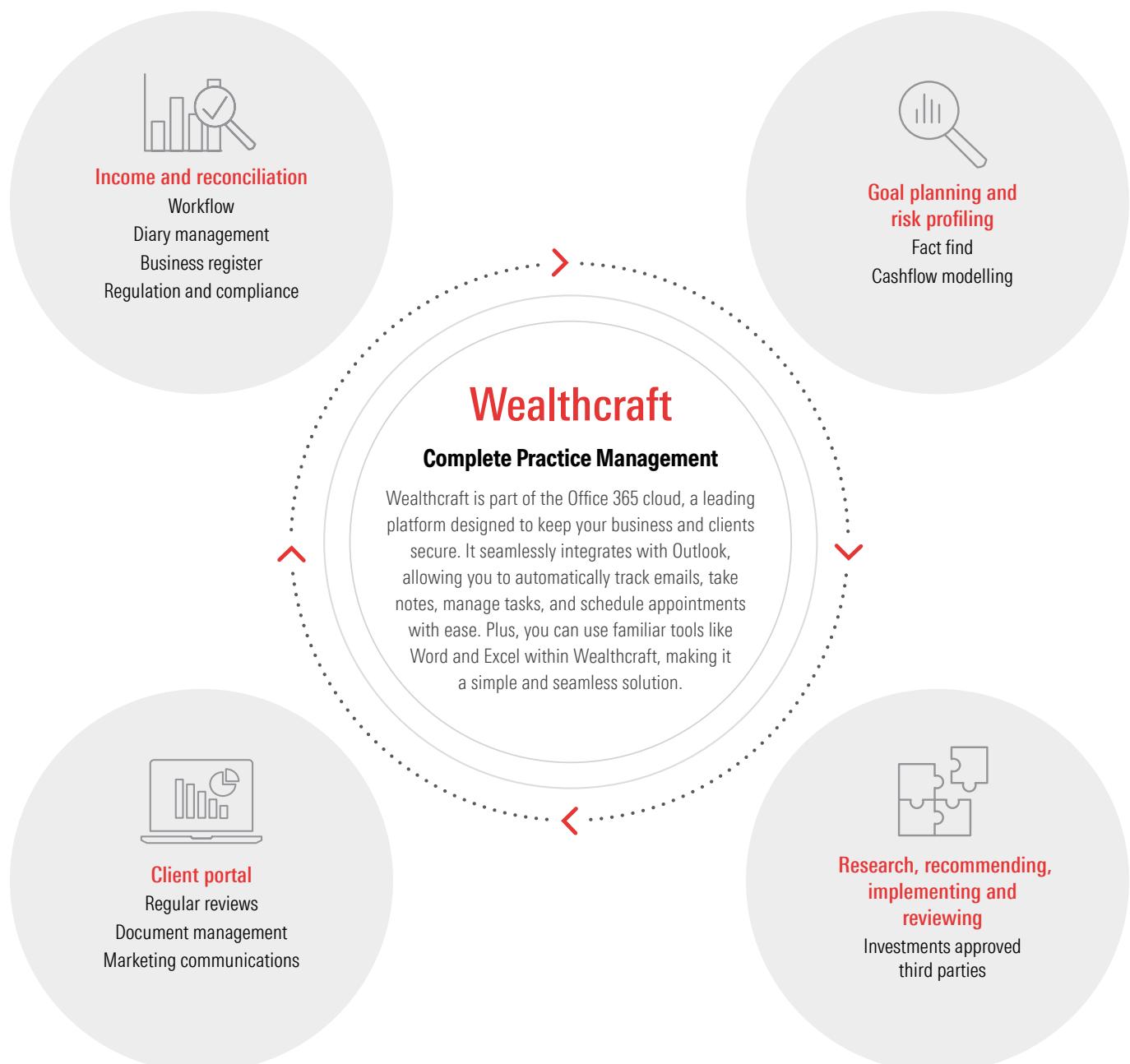
A cohesive journey, whether you want it all or specific elements

Morningstar Wealth brings together capabilities across Morningstar's global business, to meet the specific needs of financial advisers, their businesses and the clients they serve.

Modular flexibility: Choose the modules you need.

We understand that every advice practice is different, so we've deconstructed the end-to-end journey Wealthcraft can provide. Pick the areas you want and avoid paying for those you don't. With integrated providers across the market, you stay in control without the hassle of rekeying data and plugging gaps where services don't communicate.

Comprehensive journey: If you prefer a complete solution, we've built an end-to-end journey for you. We've partnered with the best connections in the market for areas where we don't consider ourselves best of breed. We've created a seamless process made up of top-tier providers every step of the way.



What to expect?

Bring to life your quality financial plans:

Enabling you to execute the quality financial plans you have created for your clients is at the center of our adviser product lineup.

Client engagement:

Supporting you to keep your clients engaged with their financial plans is at the center of our adviser service proposition.

Business support:

Solutions that enable you to scale your business, access to investment professionals and industry experts, as well as marketing and client engagement tools and support.



With you every step of the way.

We'll work closely with you at every stage. From planning to moving and settling in, you'll have a dedicated Implementation Manager and all the support you need.

Your Account Manager will contact you for a more in-depth discussion.

Talk to us today:

-  Call +44 20 4587 8415 (UK Support Line) or +85 2 2973 4615 (International Support Line)
-  adminsupport.MWP@morningstar.com
-  <https://wealthcraft.com/>
