Integrations Available for Advisor Workstation

Learn More

[Visit the Charles Schwab Digital Experience Page.]

Data Sync via Schwab Advisor Services

The data sync integration with Schwab Advisor Services in Morningstar Advisor Workstation allows client data to load into the platform. Automating the client and portfolio import process will help you work more efficiently and effectively with your entire base of clients. Please view this guide to see how to enable the import process.

eMoney Advisor

The Morningstar and eMoney Advisor integration saves you time by eliminating the need to switch between the two platforms. With this integration, you can get seamless access to Advisor Workstation FINRA-reviewed reports directly within eMoney Advisor.

This integration also gives you the ability to import client data (existing client positions) from eMoney Advisor into Advisor Workstation.

MoneyGuidePro

Morningstar Advisor Workstation integrates with MoneyGuidePro to streamline data transfer and reduce manual entry. With one click, users can export client portfolios, including underlying holdings, into Advisor Workstation for detailed analysis through reports like Portfolio Snapshot and Portfolio X-Ray. Additionally, key Morningstar portfolio reports, including individual security reports, can be generated directly within MoneyGuidePro.

This integration also gives you the ability to import client data (existing client positions) from MoneyGuidePro into Advisor Workstation.

Redtail

The Morningstar and Redtail integration saves you time by eliminating the need to switch between the two solutions. With this integration, you can get seamless access to Advisor Workstation portfolio-level and security-level reports directly within Redtail.

Albridge

With this import integration, you can bring client portfolio data from Albridge into Advisor Workstation.