

Direct Advisory Suite for Charles Schwab

Data Universes

Global: Mutual Funds, ETFs, CE, (Preferred) Stocks, Bonds, Separate Accounts, Models, Insurance & Pension Funds

US: Money Market, 529 Plans & Portfolios, CITs, Variable Annuities & Subaccounts, Variable Life & Subaccounts

Research & Due Diligence

Alerts & Watchlists

Interactive Charting

Morningstar Analyst Research

Advanced Screener with Save

Client Engagement & Prospect Engagement

FINRA-compliant client-facing reports including: Portfolio X-Ray, Portfolio Comparison, Investment Detail Report, Stock Intersection, Snapshot Report

Morningstar Portfolio Risk Score

Scenario Builder

Portfolio Management & Monitoring

Clients & Groups Dashboard

Portfolio Construction: Set allocation preferences, Side-by-side risk view, Collapsed attribute & fee settings

Interactive Portfolio Analysis

Investment Planning

Investment Proposal Tool

Morningstar Risk Tolerance Questionnaire

Morningstar Risk Ecosystem

Portfolio Optimization Tool

Mo (AI Companion)

24/7 AI chatbot & Digital Assistant Includes: Morningstar Data-Sourced Responses, Talking Point Generation, Relevant Article Sourcing and more

Integrations

Intelligent Import, Schwab Automated Overnight Batch, ByAllAccounts

Third Party: MoneyGuidePro, eMoney, Redtail

Subscription Term:

Annual

Learn More:

<https://www.morningstar.com/try/schwab>