

How do I change my Client Web Portal email address?

This procedure must be completed by the client. Provide this procedure to clients who wish to change the email address associated with their Client Web Portal (CWP).

1 Go to <https://cwp.morningstar.com>

cwp.morningstar.com

2 Login to the CWP using your old email address and current password.

3 Click "Settings"

In the upper-right corner of the screen, click **Settings**. The Update User Profile window opens.



The screenshot shows the Morningstar, Inc. Client Web Portal interface. The top navigation bar includes the Morningstar logo, a user profile icon, and the text "Welcome, David Ott". In the upper right corner, there are two buttons: "Settings" and "Log Out". A red arrow points from the "Settings" button to a callout box that says "Click this button once". Below the navigation bar, there are tabs for "Overview", "Account Details", and "Documents". The main content area is divided into two sections: "Net Worth (Asset Composition)" and "Accounts".

Net Worth (Asset Composition)			Accounts	
	Amount	Amount %	Holdings	Market Value
● Taxable	250,000.00	100.00		150,000.00
● Tax-Free	0.00	0.00	Older Holdings	100,000.00
● Tax-Deferred	0.00	0.00		
● Non-Investment	0.00	0.00		
Total	250,000.00	100.00		

4 Fill out the following fields:

- **Current E-mail**
- **Current Password**
- **New E-mail**, and

- **New E-mail(Verify).**

Web Portal Settings - Windows Internet Explorer
https://cwp.morningstar.com/CRMWebPortal/UpdateCWProfile.aspx?lang=ENU&ct=1393357535984

Update User Profile
Enter your current E-mail and Password to make any changes to your profile.

Current User Profile

Current E-Mail
Current Password

Change Email Address

New E-Mail
New E-Mail(Verify)

Change Password

New Password Password Strength
New Password(Verify)

8 - 16 characters, include at least one number, one upper case letter and one lower case letter

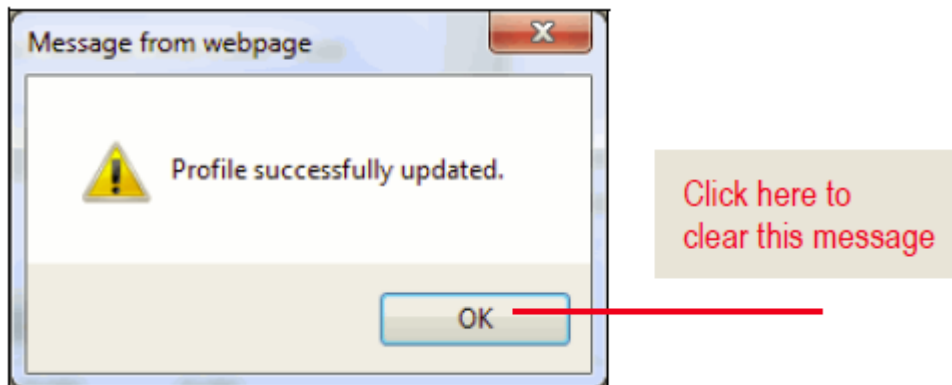
Help Submit Cancel

Fill out these fields

5 Click "Submit"



Once the e-mail is successfully changed, the following message opens:



6 Logout



In the upper-right corner of the screen click **Logout**

7 Close your browser.



8

Re-open browser window and go to <https://cwp.morningstar.com>

Go to cwp.morningstar.com

9

Login to the CWP using your new email address and password.



Congratulations! If you were able to successfully login, then your email address has been updated. If you are having any problems, please call our office at 419-425-2400.
