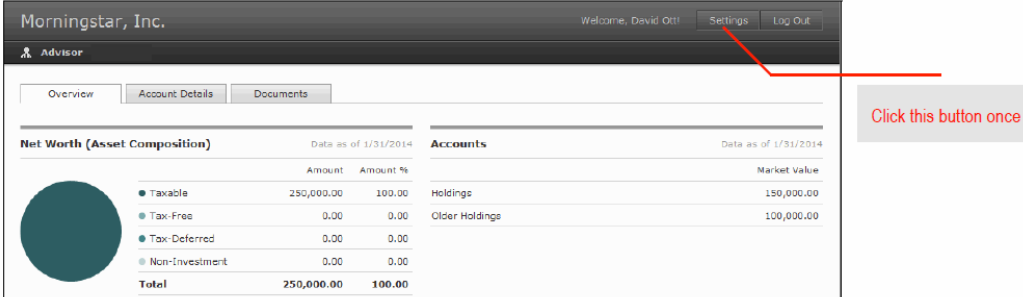


How do I change my Client Web Portal password?

- 1 Login to your Client Web Portal Using the Link Below

cwp.morningstar.com/

- 2 Click "Settings" in the Top Right Corner of your Screen



Morningstar, Inc. Welcome, David Ott Settings Log Out

Advisor

Overview Account Details Documents

Net Worth (Asset Composition) Data as of 1/31/2014

	Amount	Amount %
● Taxable	250,000.00	100.00
● Tax-Free	0.00	0.00
● Tax-Deferred	0.00	0.00
● Non-Investment	0.00	0.00
Total	250,000.00	100.00

Accounts Data as of 1/31/2014

	Market Value
Holdings	150,000.00
Older Holdings	100,000.00

Click this button once

3

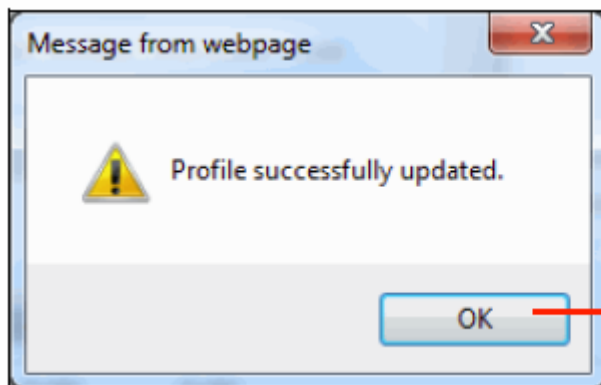
Fill Out the Fields Boxed in Red and Click Submit



Fill out these fields

4

Click OK



Click here to clear this message