

How do I login to the Client Web Portal?

1 Receive Email with Client Web Portal Link from Advisor

Dear David Ott,

Below is a link to your personal Client Web Portal Reports. If you have not previously created a Morningstar login, you will receive a second email with instructions on setting up a password for the portal. You should follow the link in that email and establish a password before clicking the link below. If you already have a Morningstar password, click the link below and enter your password.

<https://cwp.morningstar.com/>

Be sure to bookmark this link for future reference. If clicking on the link does not work, you can copy and paste the address into your browser.

This page will prompt you to log in to the Client Web Portal.

If you receive this email, you will receive another one (shown below), directing you to create a password for use with the CWP

2 Receive Email with Link to Create a Password from Advisor

Dear Morningstar Member,

Please click on the link below to create a new Morningstar password.

<https://admainew.morningstar.com/register/register.aspx?page=ChangePwd&pwec=66NON90404LN>

If clicking on the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there. This page will give you instructions for resetting your password.

Sincerely,

Morningstar Product Support

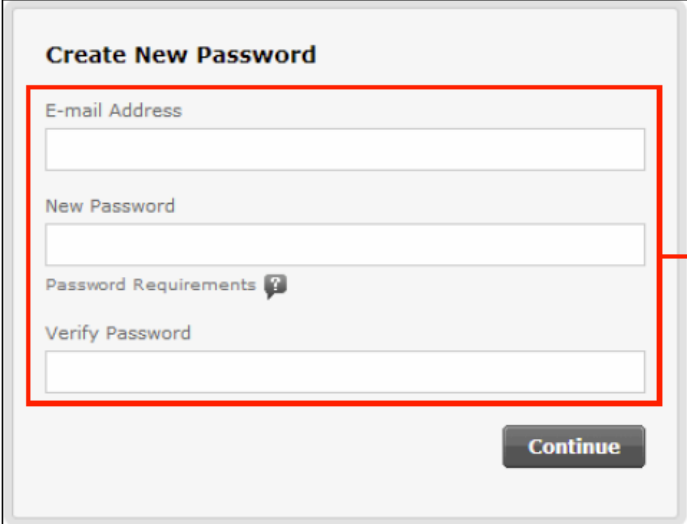
Use the link in this email to create a password you can use when logging into the CWP

3 Open Link from Email

4 Create New Password and Click Continue

1. It must be 8-16 characters long
2. It must contain numbers


3. It must contain lower and upper case letters
4. It is allowed to contain the following symbols: !@#\$%^&*?
~
5. It cannot contain sequential character strings such as "abcd"
6. It cannot contain part of your login email address
7. It cannot contain the word "Morningstar"



Create New Password

E-mail Address

New Password

Password Requirements 

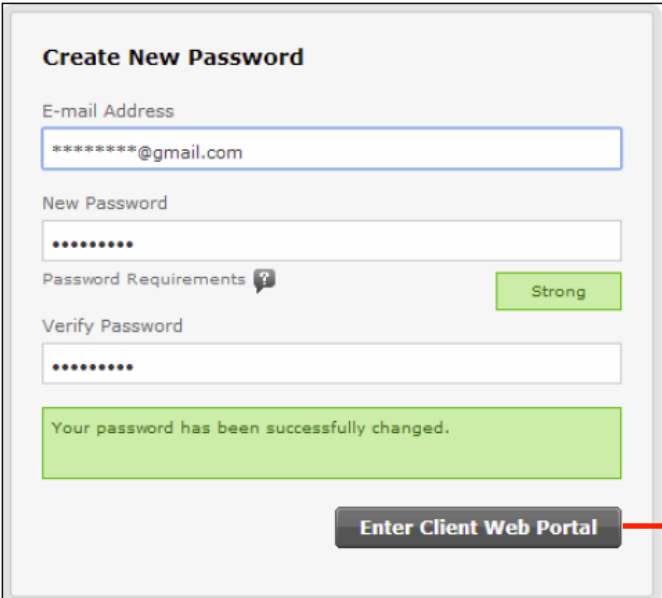
Verify Password

Continue

Fill out these three fields

5


Click Enter Client Web Portal



Create New Password

E-mail Address

New Password

Password Requirements  **Strong**

Verify Password

Your password has been successfully changed.

Enter Client Web Portal

After entering your e-mail address and a password, click this button

6

Login with Your New Password



Log In

E-mail Address

Password

Remember My E-mail Address

Forgot Password? [Click Here](#)

Enter your e-mail address and password, then click Log In

