

What do I do if I forget my password to the Client Web Portal?

1 Go to the Client Web Portal Login Page

cwp.morningstar.com/

2 Click the "Forgot Password? Click Here" Link

When the field appears, enter your email address and click **Submit**

Log In

E-mail Address

Password

Remember My E-mail Address **Log In**

Forgot Password?

Enter the e-mail address you use to log in and we will send you an e-mail on how to set your new password.

E-mail Address

Submit

If you've forgotten your password, enter your e-mail address here, then click **Submit** to reset it

3 Receive Email from

mailing1@mail.morningstar.net with the subject "Your New Morningstar Password"

If the e-mail does not arrive, it could also mean that your account is locked and you need to contact Hixon Zuercher for

assistance. If this happens, please give us a call at 419-425-2400 and we will be glad to assist you.

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=60NO881P4KKN>

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

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Open the Link from the Email Above



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Create a 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

6**Click "Enter Client Web Portal"**

Create New Password

E-mail Address
*****@gmail.com

New Password

Password Requirements ? **Strong**

Verify Password

Your password has been successfully changed.

Enter Client Web Portal

7**Enter your Email Address and New Password,
then click "Log In"****8****Note**

You have five attempts to log in. For security purposes, if you attempt to log in five times and are unsuccessful, you will be locked out, and Hixon Zuercher will need to contact Morningstar's Support team in order for you to access the Client Web Portal again. If this happens, please call us at 419-425-2400 and we will gladly assist you.