



PlanPlus Global to join Morningstar

Hello,

Today, Morningstar, a global firm specialising in independent investment research, information and technology, announced plans to acquire [PlanPlus Global](#). This includes our full product suite, which is comprised of FinaMetrica Profiler, a global risk-profiling tool renowned around the world, our financial planning solution ProPlanner (formerly Plan*it*) and ProTracker, our powerful portfolio monitoring tool.

PlanPlus Global has enjoyed a long-standing relationship with Morningstar, and discussions about closer collaboration between our two organizations evolved naturally. Over time, it became apparent to both firms that, together on a global scale, we could offer risk profiling, financial planning and 'suitability' software unlike any other available. Our combined solutions will help advisors better manage their day-to-day workflow, enhance client engagement, meet compliance obligations and produce digital advice underpinned by Morningstar's institutional-grade data, information and research.

With similar values and philosophies, supported by greater financial and technical strength, we will be able to provide advisors and their clients with an expanded product suite, an enhanced level of training and state-of-the-art tools. Morningstar's independence, research-driven culture and trusted brand makes it an ideal home for PlanPlus Global capabilities.

What happens now?

PlanPlus Global will continue to deliver our award-winning financial planning, risk profiling and suitability software and services to you. As your technology partner, now reinforced by the resources of Morningstar, we will look to provide you with access to a broader set of tools, data and support to help you achieve new heights in your business – and improve outcomes for your clients.

It is our sincere belief that PlanPlus Global and Morningstar will be stronger together and that you will welcome the enhanced financial and technological capabilities, as well as expanded thought leadership to further empower investor and client success. You can read more in our media release: [English](#) | [Français](#).

Change often brings questions, and we invite you to reach out to Larry Bowen, SVP, with any queries – larry.bowen@planplus.com. These are exciting times for PlanPlus Global and a win-win for us and our clients!

Regards,
Shawn Brayman
CEO PlanPlus Global