



Thank you for registering for these Industrial Alliance dedicated sessions hosted by Morningstar, designed to help you maximize your use of Advisor Workstation.

Navigating Advisor Workstation

October 31st | 1:30 p.m.- 2:15 p.m. EST

Join this exclusive session, dedicated to Industrial Alliance, "*Navigating Advisor Workstation: Streamlining Client Info, Portfolios, and Visual Reports.*" Whether you're a new or experienced user, this session will help you fully leverage the platform.

In this session, you'll learn how to:

- Efficiently add and manage client information
- Save and manage client Information/Portfolios efficiently
- Create high-quality, visual reports to enhance client presentations
- Create hypothetical illustrations for a client portfolio

Register

Revolutionize Your Research Experience!

November 7th | 1:30 p.m.- 2:15 p.m. EST

Join this exclusive session, dedicated to Industrial Alliance, to streamline your research and create personalized views tailored to your Investment Universe. Discover how to enhance your research with Morningstar's in-depth tools and elevate your client conversations.

In this session, you'll learn how to:

- Utilize the Screener Tool and Advanced Search
- Manage Lists and utilize Graphs for data visualization
- Generate comprehensive Investment Reports and customize your views

Register