

Consulting Case Study: Strategic Support

MORNINGSTAR

Morningstar, a global investment research company, needed a strategic roadmap to up-market in the RIA wealth space and better serve their existing customers.



Issues

- Existing TAMP platform lacked key capabilities for larger firms
- Direct indexing sold as a product instead of provided as part of a platform
- Served a large number of small firms with no relationship to drive additional revenue
- Various assets of the company not aligned



Results

- Company restructured to create a wealth management unit to better align resources
- UMA capabilities added to enhance TAMP platform
- Press release: [Morningstar Launches Wealth Management Solutions Group to Connect Capabilities for Advisors](#)