



ByAllAccounts Data Sources with Professional Access

Below is a list of advisor and institutional financial services with professional access to the Morningstar® ByAllAccountsSM aggregation service as of May 10, 2018. Using an advisor's online access and credentials, ByAllAccounts can capture positions and transactions across the advisor's book of business at the institutions offering these services, without the need for a client's online access credentials. As is the case with all types of financial services, this list is expanding as we add new clients and pursue the most efficient methods for populating our database with comprehensive client account information.

1st Global - Brokerage - Financial Advisor	Alliance Benefit Group Rocky Mountain Employee Benefits, Inc. - Advisor
1st Source Bank - Retirement Plan Services - Sponsor	Alliance Benefit Group Rocky Mountain Employee Benefits, Inc. - Sponsor
401k Complete - Advisor	Alliance Plan! - Sponsor
401k Complete - Sponsor	Alliance Retirement Plan - Sponsor
401k Focus - Advisor	Allianz Life - Agent
401k Plus - Advisor	Alpine Bank (IL) - Retirement - Advisor
401k Plus - Sponsor	Alpine Bank (IL) - Retirement - Plan Sponsor
401kDIRECTPRO - Advisor	American Equity Investment Life Insurance Company - Agent
401kDIRECTPRO - Sponsor	American Funds Retirement Planning Center - Sponsor
401kPAL Participant Account Link - Financial Advisor	American General Life Companies - Agent
401kPAL Participant Account Link - Plan Sponsor	American Legacy - Annuities - Adviser
529 QuickView - Advisor	American Pension Benefits - Advisor
Actuarial Benefits and Design Company - Advisor	American Pension Benefits - Sponsor
Actuarial Benefits and Design Company - Sponsor	AMG National Trust Bank - Retirement - Financial Advisor
ADP Retirement Services (mykplan.com) - Sponsors and Advisors	AMG National Trust Bank - Retirement - Plan Sponsor
AdvisorCentral	AMI Benefit Plan Administrators Inc - Advisor
Alliance Benefit Group Development Site - Sponsor	Armstrong, Doyle, & Carroll - DayVest - Financial Advisor
Alliance Benefit Group North Central States - Sponsor	Armstrong, Doyle, & Carroll - DayVest - Plan Sponsor
Alliance Benefit Group of Houston - Advisor	ASC Trust Corporation - Advisor
Alliance Benefit Group of Houston - Sponsor	Ascensus - Plan Sponsor (SponsorinSight)
Alliance Benefit Group of Illinois - Financial Advisor	Ascensus College Savings (QuickView Advisor) - SFTP Access
Alliance Benefit Group of Michigan (Retirement Funding Corporation) - Advisor	
Alliance Benefit Group of Michigan (Retirement Funding Corporation) - Sponsor	

Ascensus Consulting - Plan Sponsor
 Aspire Financial Advisor - SFTP
 Aspire Financial Services - Advisor
 ATEL Securities Corporation - Representative
 Athene Annuity - Agent
 Athene USA - Agent (Athene Connect)
 Austin Capital Retirement Plan Services - Advisor
 Austin Capital Retirement Plan Services - Sponsor
 Ave Maria Mutual Funds - Advisor
 Baden Retirement Plan Services - Sponsor
 Banco Popular (Puerto Rico) - Retirement Plans
 - Advisor
 Banco Popular (Puerto Rico) - Retirement Plans
 - Sponsor
 Beneco - Sponsor
 Benefit Consultants Group - Advisor
 BeneSys - Advisor
 BeneSys - Sponsor
 Beneworld - Advisor
 Beneworld - Sponsor
 Bernstein Investment Research and Management
 - Professional
 Billings and Company - Advisor
 Boetger & Associates - Advisor
 BOK Financial Asset Management - Advisor
 BOK Financial Asset Management - Sponsor
 Bright Directions - Broker
 C.H. Dean Financial - Financial Advisor
 C.H. Dean Financial - Plan Sponsor
 California Investment Trust Fund Group 401(k)
 - Financial Advisor
 California Investment Trust Fund Group 401(k)
 - Plan Sponsor
 California Pension Administrators & Consultants
 (CalPac) - Financial Advisor
 California Pension Administrators & Consultants
 (CalPac) - Plan Sponsor
 Capella - Advisor
 Capella - Sponsor
 Carrollton Bank Advisor - SFTP
 Central Bank Retirement Plan - Financial Advisor
 Central Bank Retirement Plan - Plan Sponsor
 Charles Schwab & Co., Inc. - SchwabPlan Sponsor
 Charles Schwab Institutional - SFTP
 Chemical Bank - NW Retirement - Advisor
 Chemical Bank - NW Retirement - Sponsor
 Chemical Bank - Retirement - Advisor
 Chemical Bank - Retirement - Sponsor
 Chernoff Diamond - Sponsor
 Citizens Bank & Trust (MO) - Retirement - Advisor
 Citizens Bank & Trust (MO) - Retirement - Sponsor
 Clinton National Bank - Retirement - Advisor
 Clinton National Bank - Retirement - Sponsor
 CMC Interactive - Advisor
 Cohn Reznick Retirement Plan Services - Plan Sponsor
 CollegeChoice Advisor 529 Savings Plan - Advisor
 CollegeCounts 529 Advisor Plan
 - Advisors/Broker/Professional
 CollegeCounts 529 Direct Plan
 - Broker/Professional
 Columbia Benefits Consultants - Advisor
 Columbia Benefits Consultants - Sponsor
 Commonwealth Annuity and Life Insurance
 Company - Advisor
 Community National Bank (Retirement Plans)
 - SFTP Access
 Cornerstone Bank (NE) - Retirement - Advisor
 Cornerstone Bank (NE) - Retirement - Participant
 Cornerstone Bank (NE) - Retirement - Sponsor
 Correll Co - Advisor
 Correll Co - Sponsor
 Cortland Capital Markets Services (BasePoint)
 - SFTP Access
 Creative Planning TPA - Advisor
 Creative Planning TPA - Sponsor
 Daily Value Plan - Advisor
 Daily Value Plan - Sponsor
 DayPak & FlexPak Participant Portal - Advisor
 DayPak & FlexPak Participant Portal - Sponsor

DeWaay Benefit Administrators - Advisor
DeWaay Benefit Administrators - Sponsor
DST - Branch/Tax ID Access ONLY
E*TRADE - Advisor
Employee Benefit Resources - Advisor
Employee Fiduciary - Advisor
Employee Incentive Plans (EIP) - Advisor
Employee Incentive Plans (EIP) - Sponsor
Empower Retirement PartnerLink - Sponsor
Envoy Financial - Envoy Choice - Employer
Envoy Financial - Envoy Choice - Oversight Team
ERISA Partners - Plan Sponsor
Estratas - Plan Sponsor
EverBank - Advisor Services
Federated Investors SmartStream - FTP
Fidelity & Guaranty Life - Agent
Fidelity AdvisorXpress - Financial Advisors
Fidelity Charitable Gift Fund - Advisor
Fidelity IWS - FTP Access
Fidelity IWS (non-brokerage) Affiliate Accounts - FTP
Fidelity Plan Sponsor Webstation
Field & Main Bank - Retirement - Advisor
Field & Main Bank - Retirement - Sponsor
Financial Decisions - Financial Advisor
Financial Decisions - Plan Sponsor
First Bank & Trust (SD) - 401K Account - Advisor
First Bank & Trust (SD) - 401K Account - Sponsor
First Mercantile Trust - Investment Professional
First Merchants Corporation - 401(k) - Advisor
First Merchants Corporation - 401(k) - Sponsor
First Midwest Bank - Retirement - Advisor
First Midwest Bank - Retirement - Sponsor
First National Bank of Fort Smith - Retirement
- Advisor
First National Bank of Fort Smith - Retirement
- Sponsor
Foley & Lardner - FTP
Foliofn Investments Advisor Download Center
Fringe Benefits Design - 401(k)/403(b) - Advisor
Fulton Financial Advisors 401(k) - Advisor
Fulton Financial Advisors 401(k) - Sponsor
FutureBenefits of America - Financial Advisor
FutureBenefits of America - Plan Sponsor
GEMGroup - Advisor
GEMGroup - Sponsor
Genesis Employee Benefits - America's VEBA
Solution - Plan Sponsor
Glenview State Bank - Retirement - Sponsor
Gold Bullion International (GBI) - FTP
Government Employee Benefits Corporation
(GEBCorp) - Financial Advisor
Government Employee Benefits Corporation
(GEBCorp) - Plan Sponsor
Great American Insurance Group - Annuity
Investors Life Insurance Company
- Variable Annuities - Agent
Great American Insurance Group - Great American
Life Insurance Company - Annuities - Agent
Greenleaf Trust - Retirement Plan - Advisor
Greenleaf Trust - Retirement Plan - Sponsor
Heartland Retirement Plan Services - Advisor
Heartland Retirement Plan Services - Participant
Heartland Retirement Plan Services - Sponsor
Heritage Pension Advisors - Financial Advisor
Heritage Pension Advisors - Plan Sponsor
HK Financial Services - Retire Login - Advisor
HK Financial Services - Retire Login - Sponsor
Hooker & Holcombe Retirement Services
- Financial Advisor
Hooker & Holcombe Retirement Services
- Plan Sponsor
Howard Simon & Associates - Advisor
Howard Simon & Associates - Sponsor
HPL&S - Advisor
ICapital Retirement Plan Services - Advisor
ICapital Retirement Plan Services - Sponsor
IE Shaffer - Plan Sponsor
Independent Pension Solutions - Advisor

Independent Pension Solutions - Sponsor
 Independent Pension Solutions (DPS) - Advisor
 Independent Pension Solutions (DPS) - Sponsor
 Ingham Retirement Group - Advisor
 Integrity Life Insurance Company - Representatives
 Investrust - Advisor
 Investrust - Sponsor
 iShares 529 Plan - Advisor
 Jackson National Life Insurance of New York
 Producer Services
 Janney Montgomery Scott LLC. - Vestmark FTP
 Jefferies FTP
 Jefferson National - FTP Access
 JNat - Agent & Advisor
 Jocelyn Pension Consulting - Advisor
 Jocelyn Pension Consulting - Sponsor
 John Hancock USA - Plan Sponsor
 Joint Retirement Board for Conservative Judaism
 - Advisor
 Joint Retirement Board for Conservative Judaism
 - Sponsor
 Journey Retirement Plan Services - Advisor
 Journey Retirement Plan Services - Sponsor
 JPMorgan Access - SFTP
 JPMorgan Private Bank - SFTP
 July Business Services - Advisor
 KT Administrators - Financial Advisor
 KT Administrators - Plan Sponsor
 KTRADE - Advisor
 Leading Retirement Solutions - Advisor
 Legacy Marketing Group - Agent
 LeTort Trust - Advisor
 LeTort Trust - Sponsor
 Liberty Bankers Life - Agent
 Lifetime Benefit Solutions - Financial Advisor
 Loring Ward - Advisors
 LPL Financial - Account View - Advisor
 LT Trust - 401(k) - Advisor
 LT Trust - 401(k) - Sponsor
 Macatawa Bank - Retirement - Advisor
 Macatawa Bank - Retirement - Sponsor
 MassMutual Annuities - Advisor
 MassMutual Retirement Access - Plan Sponsor/TPA
 MassMutual Retirement Plans - Financial Professional
 McCready and Keene, Inc. - Plan Sponsor
 Meeder Funds - Broker Dealer/Advisor
 Merrill Lynch - FTP
 Merrill Lynch - SFTP
 MetLife of Connecticut AccountViewer - Producer
 Michigan Employee Benefit Services, Inc. (MEBS)
 - Advisor
 Michigan Employee Benefit Services, Inc. (MEBS)
 - Sponsor
 Midland National Life Insurance Company
 - Annuity (Agent)
 Millennium Trust - FTP
 Milliman Your Benefit Site - Advisor
 Milliman Your Benefit Site - Sponsor
 Morningstar Marketplace
 MVP Plan Administrators - Plan Sponsor
 MyAccountValue.com - Financial Advisor
 MyAccountValue.com - Plan Sponsor
 MyBestPlan.com - Advisor
 MyBestPlan.com - Sponsor
 MyPlanAccount by Heintzberger/Payne - Advisor
 National Benefit Services - Advisor
 National Benefit Services - Sponsor
 National Financial Services (Streetscape)
 - Professional
 Nationwide Financial Services - Financial Advisor
 - Sales & Service Center
 Nebraska Educational Savings Trust - Advisor Plan
 - Advisor
 NestEgg University - Advisor
 New England Pension Plan Systems - Advisor
 New England Pension Plan Systems - Sponsor
 New York Life Retirement - Plan Sponsor
 Newport Group (benefitwebaccess) - Advisor
 Newport Group (benefitwebaccess) - Sponsor

Newport Group (DailyAccess) - Advisor
 Newport Group (PlanDestination) - Sponsor
 Noble-Davis Consulting - Advisor
 Noble-Davis Consulting - Sponsor
 Northern Trust - FTP Access
 NRS Trust Product Administration - Broker
 Nyhart - 401(k) Plan Sponsor
 Nyhart - Financial Advisor
 Old National Bank - Financial Advisor
 Old National Bank - Plan Sponsor
 Old Second - 401(k) - Financial Advisor
 Old Second - 401(k) - Plan Sponsor
 OneAmerica - Life and Annuity Producer
 OneAmerica Securities - Registered Representative
 Oppenheimer FTP
 Oppenheimer Funds - Financial Advisor
 OptumHealth Financial Services - Plan Sponsor
 Orange Bank and Trust - SFTP
 P&A Group Retirement - Advisor
 P&A Group Retirement - Sponsor
 Pacific Life - FTP
 Pacific Life Annuities & Mutual Funds - Producer
 Paychex Online - Advisor
 Paychex Online Retirement Services
 - Advisor/Employer
 PB&H Benefits - Advisor
 PB&H Benefits - Sponsor
 Pelion Benefits - Advisor
 Pelion Benefits - Sponsor
 Pencal - Plan Sponsor
 Penn Mutual - Producer
 Pensco Trust Company - Advisor
 PenServ Plan Services - Advisor
 Pension Corporation of America - Financial Advisor
 Pension Corporation of America - Plan Sponsor
 Pension Inc. InterLink - Advisor
 Pension Inc. InterLink - Sponsor
 PenSys Daily Valuation Plan - Financial Advisor
 PenSys Daily Valuation Plan - Plan Sponsor
 Pentegra Retirement Services - Advisor
 People's United Bank Retirement Services (iPlan)
 - Advisor
 People's United Bank Retirement Services (iPlan)
 - Sponsor
 Plan Administrators Inc. - Financial Advisor
 Preferred Pension Concepts (PPC) - Advisor
 Preferred Pension Concepts (PPC) - Sponsor
 Primark Benefits - PBRetire - Plan Sponsor
 Professional Capital Services (PCS) - Sponsor
 Profit Sharing Plan Administrators, Inc. - Advisor
 Profit Sharing Plan Administrators, Inc. - Sponsor
 Prudential Annuities - Financial Professional Login
 Prudential Financial Retirement - Plan Sponsor
 Prudential Xpress
 Public Agency Retirement Services (PARS)
 - Plan Sponsor
 Putnam Investments Financial Advisor
 Qualified Plan Administrators - Advisor
 Qualified Plan Administrators - Sponsor
 Qualified-Solutions (Allen, Gibbs & Houlik) - Advisor
 Qualified-Solutions (Allen, Gibbs & Houlik) - Sponsor
 Quorum Consulting Group - Advisor
 Quorum Consulting Group - Sponsor
 Randall & Hurley, Inc. (RHI) - Advisor
 Randall & Hurley, Inc. (RHI) - Sponsor
 RBC DataWorks
 REDW - Benefits Plan - Advisor
 REDW - Benefits Plan - Sponsor
 Reform Pension Board - RPB InfoExpress - Advisor
 Reform Pension Board - RPB InfoExpress - Sponsor
 Reinhart - BrickFTP
 Reliance Trust - SecureLink SFTP
 Retirement Alliance - Plan Sponsor
 Retirement Direct - Sponsor/Advisor
 Retirement Horizons Inc. (RHI) - Advisor
 Retirement Plan Consultants - Advisor
 Retirement Plan Consultants - Sponsor

Retirement Planners and Administrators - Sponsor
 Retirement Strategies Group - Advisor
 Retirement Strategies Group - Sponsor
 Retirement Strategies, Inc. - Sponsor
 RetirementVista by WESPAC - Financial Advisor
 RetirementVista by WESPAC - Plan Sponsor
 RiversEdge - Plan Sponsor
 RiverSource - Annuity - Financial Professionals
 Rogers Wealth Group - Advisor
 Rogers Wealth Group - Sponsor
 RPS Benefits - Advisor
 Schenck Retirement Plan Solutions - Advisor
 Schenck Retirement Plan Solutions - Sponsor
 Schnitman Group - Advisor
 Schnitman Group - Sponsor
 SchoolsFirst Federal Credit Union
 - Plan Administration - Employer
 Securian Retirement Center for Financial Professionals
 Security National Bank (IA) - 401(k)
 - Financial Advisor
 Security National Bank (IA) - 401(k)
 - Plan Sponsor
 Sentry Insurance - Sponsor
 Slavic401k.com - Advisor
 Slavic401k.com - Sponsor
 Spectrum Pension Consulting - Advisor
 Stanley Benefits - Advisor
 State University System Optional Retirement
 Program (SUSORP) - VALIC Retirement
 - Sponsor
 Steele Capital Management - Financial Advisor
 Sun Life Financial - Advisor
 Sun Life USA - FinancialProLink (Advisor)
 SunGard - Retirement - Advisor
 TD Ameritrade - Institutional SFTP Access
 TD Ameritrade - Institutional Trust VEO
 TD Ameritrade Advisor Services
 The Retirement Plan Company - Advisor
 The Retirement Plan Company - Sponsor
 The Retirement Plan Optimizer - Advisor
 The Retirement Plan Optimizer - Sponsor
 The Trust Company of Knoxville - Advisor
 The Trust Company of Knoxville - Sponsor
 The Trust Company of Oklahoma - Retirement
 - Advisor
 The Trust Company of Oklahoma - Retirement
 - Sponsor
 TIAA-CREF Advisor
 TIAA-CREF Advisor - Client Data Download
 TNStars 529 College Savings Program - Advisor/Broker
 Touchstone Retirement Group - Advisor
 Touchstone Retirement Group - Sponsor
 Town and Country Bank (IL) - Retirement
 - Financial Advisor
 Town and Country Bank (IL) - Retirement
 - Plan Sponsor
 TPC 401(k) - Sponsor
 TPP Retirement Plan Specialists - Advisor
 TR Paul Inc. - Advisor
 TR Paul Inc. - Sponsor
 Transamerica Retirement Services
 |- Financial Professionals
 Transamerica Retirement Solutions
 - Plan Sponsor Direct
 Trust & Investment Services - Advisor
 Trust & Investment Services - Sponsor
 Trust Company of America 401K - Advisor
 Trust Company of America 401K - Sponsor
 Trust Company of Illinois - My 401K - Sponsor
 Trust Point Inc. - Retirement - Advisor
 Trust Point Inc. - Retirement - Sponsor
 Turning Point Associates - Advisor
 TWG Benefits - Advisor
 TWG Benefits - Sponsor
 Ubiquity Retirement + Savings - Sponsor and Advisor
 UBS Financial Services FTP Dropbox
 - SecureTransport
 UBS Financial Services FTP Dropbox
 - SecureTransport (Separate Sleeves)

Union Bank & Trust Company (NE, KS)
- Retirement - Advisor

Union Bank & Trust Company (NE, KS)
- Retirement - Sponsor

USAllianz - Agent

ValueWorks FTP

Vantage Benefits - Advisor

Vantage Benefits - Sponsor

Verisight - Advisor

VLP Corporate Services - Advisor

VLP Corporate Services - Sponsor

Voya Retirement Professionals

Wabash Capital Investment Management Services
- Alliance Benefit Group - Financial Advisor

Wabash Capital Investment Management Services
- Alliance Benefit Group - Plan Sponsor

WealthTouch FTP - JPMorgan Chase

WealthTouch FTP - Northern Trust

Wedbush - FTP Access

Wells Fargo Advisors - SFTP

Wells Fargo Data Transmission Services - SFTP

Wells Fargo Prime Services - FTP

Wells Fargo Trust - SFTP

Weston Financial - FTP Access

WYE Financial & Trust - SFTP Access