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## **FOR IMMEDIATE RELEASE**

### **PlanPlus Chooses Morningstar Global Fund and Equity Data for Web Advisor Platform**

TORONTO, May 6, 2008 – Morningstar Canada, a wholly owned subsidiary of Morningstar, Inc. (Nasdaq: MORN), today announced that it will be providing global mutual fund and stock data for the PlanPlus Web Advisor platform used by financial planners in Canada, the United States, the U.K., and Asia.

Under the agreement, Morningstar will provide PlanPlus with portfolio data on mutual funds for sale in Canada, the United States, the U.K., France, Spain, offshore and Asia, as well as daily performance data on stocks traded in Canada, the United States, and the U.K.

“We are very pleased with the new arrangement,” said Lynne Myles, vice president of product development for PlanPlus. “A key benefit of our Web Advisor is the ability for advisors to identify the existing asset allocation of a client’s current holdings as well as accurately illustrate the recommended asset allocation and demonstrate how specific products fulfill that target. To do this we need a reliable electronic source that provides a proper categorization of the investments, not just in Canada but worldwide.”

“We are excited to provide users of the PlanPlus software with the opportunity to utilize Morningstar’s comprehensive global investment data,” said Scott Mackenzie, president and CEO of Morningstar Canada. “Financial planners and advisors who use the software can now make consistent comparisons and plans spanning many different investment types.”

Morningstar will provide additional mutual fund data to allow advisors to determine suitability for their clients. Over 300 additional data points will be available on each mutual fund that PlanPlus will provide to advisors within Web Advisor. Daily pricing will also be available on all mutual funds and stock products.

The most important of these data points will allow PlanPlus to categorize funds more accurately into the primary asset classes for a specific jurisdiction, as well as introduce some additional analytics on the aggregated portfolio. Morningstar also provides a detailed country breakdown on funds. This information, along with GICS classifications, capitalization classifications, investment style classification, maturity on bonds, bond ratings, and more will allow PlanPlus a far more automated and effective classification of these investments for users.

For users in Canada, the United States, and the U.K., where stock data is included in the universe, PlanPlus will be able to determine the domicile of the listed company. For example, although “Royal Bank of Canada” is listed on the NYSE, it can still be categorized as a Canadian equity. In addition, sector classifications and industry classifications using GICS codes, and in some cases the Morningstar® Style Box™ indicator, will allow Web Advisor to differentiate small- and mid-cap from large-cap holdings. This will be a significant improvement for IDA users utilizing the stock universe regularly.

**About PlanPlus Inc.**

PlanPlus Inc. is a Canadian firm that provides wealth management and financial planning software solutions to financial services firms worldwide. PlanPlus has become a world-recognized firm with its groundbreaking software PlanPlus Web Advisor, and industry-leading training and service offerings. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. Customers include major banks, stock brokers/investment firms, insurance, credit union, mutual fund and financial planning firms in nine countries around the world. PlanPlus is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

**About Morningstar, Inc. and Morningstar Research Inc.**

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of Internet, software, and print-based products and services for individuals, financial advisors, and institutions. Morningstar provides data on more than 270,000 investment offerings, including stocks, mutual funds, and similar vehicles. The company has operations in 18 countries and minority ownership positions in companies based in three other countries. Morningstar Research Inc. is a wholly owned subsidiary of Morningstar, Inc.

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