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Adhesion Model eXchange Adds Morningstar ETF Asset Allocation Series

November 26, 2014 – Charlotte, NC – Adhesion Wealth Advisor Solutions (Adhesion), a personalized Unified Managed Account (UMA) platform for Registered Investment Advisors (RIAs) nationwide, is pleased to announce the addition of the ETF Asset Allocation Series from Morningstar Investment Services, Inc. (Morningstar) to the Adhesion Model eXchange (AMX). Morningstar Investment Services is part of the Morningstar Investment Management group.

“The Morningstar ETF Asset Allocation Series is a great addition to our AMX lineup, further expanding the options available to advisors utilizing our personalized UMA platform,” Michael Stier, CEO of Adhesion said. “The quality of Morningstar’s thought leadership and recognizable brand will be great assets for our advisors as they work to help their clients reach their financial goals.”

“The Adhesion Model eXchange has largely been an advisor-driven marketplace of leading investment managers and strategists. We heard strong interest in Morningstar’s ETF Asset Allocation Series because of the company’s independence and trusted brand. This new series of ETF-based strategies offers advisors a portfolio solution based upon a deep foundation of research and brand well recognized by many of their clients,” said Barrett Ayers, Adhesion’s Chief Solutions Officer.

“Like Adhesion, we’re focused on helping advisors build efficient, scalable practices and achieve better outcomes for their clients,” said Jeffrey Ptak, president and CIO of Morningstar Investment Services. “We created our ETF asset allocation portfolios in 2007 to help advisors deliver low-cost, active investment options to their clients.”

The lineup of five ETF portfolios draws on the data and research capabilities of parent company Morningstar, Inc. Each risk-based portfolio is constructed using a “core and explore” investment process. The core positions anchor the portfolios by providing exposure to long-term strategic investments. The explore positions track narrower segments of the markets, such as a particular investment style, region, or sector, to pursue market opportunities.

For media inquiries regarding Adhesion Wealth Advisor Solutions, please contact Kathran Martin at kjmartin@adhesionwealth.com

About Adhesion Wealth Advisor Solutions

Founded in 1999, Adhesion offers RIAs a **highly personalized, open architecture UMA platform** that delivers their essential investment services—reporting, reconciliation, trading and monitoring. Focused exclusively on RIAs, Adhesion is the only integrated UMA platform with the flexibility to deliver an advisor's unique investment and business model.

Located in Charlotte, NC, Adhesion currently has more than \$13 billion in assets under administration. For further information, visit Adhesion Wealth Advisor Solutions at www.adhesionwealth.com.

About Morningstar Investment Services, Inc.

Morningstar Investment Services is a registered investment adviser and a wholly owned subsidiary of Morningstar, Inc.. Morningstar Investment Services is a non-discretionary investment manager. It is part of the Morningstar Investment Management group, which creates investment solutions that combine award-winning research and global resources with proprietary Morningstar data. With approximately \$169 billion in assets under advisement and management as of Sept. 30, 2014, the entities that make up the Morningstar Investment Management group provide comprehensive retirement, investment advisory and portfolio management services for financial institutions, plan sponsors and advisors around the world. For more information about Morningstar Investment Services, please visit: www.corporate.morningstar.com/mis.