Using MorningStar Client Portal

MorningStar is used to send out Client Reports one day prior to your Reviews. It also can be used to securely send us any documents that we may request, and is the method that we recommend when sending reports digitally. Please use the following steps to access your reports, as well as send us any requested documents.

1. A link to the MorningStar Website can be found at https://fosterfinancial.net/important-links under "MorningStar Client Login".
2. Login to your MorningStar Portal
3. Click "Documents"
    a. This is where you will see any reports that we have sent you, as well as anything that you have sent us.
4. Click "Upload"
5. Once your documents are uploaded, we receive a notification via email.

If you have any troubles with uploading documents, feel free to call our office at 260-234-2200.

***In Order for the MS Portal to be active for clients, you must be sent an invitation to use the portal. If you have not received an invitation, please contact our office at 260-234-2200 to have one sent to you.*

-The Foster Financial Team

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