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1. To access the platform, visit [cerulli.com](http://cerulli.com). If you do not have a username and password, click on "Register Now" or contact [mmidata@cerulli.com](mailto:mmidata@cerulli.com) and we will generate your credentials. If you have an existing Cerulli account, enter your username and password, then click "Login" to enter your credentials. The platform is best accessed using Google Chrome, but is also compatible with Internet Explorer and FireFox.
2. Once logged in, you will see your name in the top right-hand corner. Select "My Dashboard" at the top right next to your name. This will populate a list of your firm's current research subscriptions for all products.
3. Click the "My Lodestar Platform" tab on the left-hand side navigation.
4. You can select "Launch Lodestar" to the right of MMI/Cerulli Advisory Solutions Data and this will launch the complete platform.
5. Here you'll find the "MMI/Cerulli Advisory Solutions Data" tile in addition to other Lodestar subscriptions to which your company has access. Click "View" to open the subscription. If you're experiencing difficulty navigating the platform, or simply wish to have more training, we encourage you to select the "Schedule a Demo" link.
6. Above that, you'll see a plus and folder icon, which will allow you to expand and collapse all the module and sub module folders within this subscription. There is also a "My Favorites" folder. To add a chart to your favorites, right click on the chart and select "Add to Favorites." This will allow you to store the chart for quick access the next time you log in.

You can type any word into the search box at the top left, such as "sponsor", and it will pull up specific exhibits that have that word in their title. If you click the "x" on the search box, it will bring you back to your full navigation list.

7. When you first click on an exhibit, expand the screen using the arrow in the upper right-hand corner. The expanded view will ensure that you're able to see all the data within each exhibit.

On the right-hand side, you'll notice the filters available for this chart. The filters allow you to customize the exhibit. For instance, this exhibit allows you to display assets, net flows, or accounts.

8. Export data easily by clicking "Download" on bottom right.

The four export options are:

- Image: a JPEG
- Data: a txt file (txt)
- Crosstab: an Excel file (most commonly used)
- PDF

Below the download button is a "Last Updated" section, which tells you when the exhibit was most recently updated.

9. If you are looking for specific information about a chart, please hover over the MMI logo. This is what we call a Notable. This will give you some additional information from our analysts about this specific chart.
10. To toggle between multiple exhibits, click on the plus sign at the top to create a new tab, and then click on another exhibit in the left-hand navigation bar.

11. You can also find the Advisory Solutions Data quarterly summary PDF on this platform.
12. There is a “Helpful Hints” page at the top right corner, identified by the “i” icon.
13. Please submit any questions or concerns you have about an exhibit in the Questions/Comments feedback section in the bottom left-hand corner of the screen.

Please email us ([mmidata@cerulli.com](mailto:mmidata@cerulli.com)) with questions or concerns.