

FCA: Update to Investment Platforms Market Study

The FCA has launched a new study to assess the competition between platforms and whether they serve investors' best interests. Christopher Woolard, Executive Director of Strategy and Competition at the FCA, said:

"Platforms have the potential to generate significant benefits for consumers and we want to ensure consumers are receiving these benefits in practice..." [Read more.](#)

Stellar Commitment

At Stellar we are committed to improving transparency within our range of inheritance tax planning services and more widely within the industry. We have developed a range of estate and succession planning services which provide choice and control to clients and we are constantly striving to charge for these services in the fairest way possible.

One of the ways we have done this is by making our AiM portfolios for inheritance tax planning available on UK platforms.

And that's why...

With effect from 1 August 2017 the annual management fee for our AiM IHT portfolio (via platform) has been reduced to just 0.75% per annum (plus VAT).

Inheritance tax planning using AiM portfolios on wrap platforms is a rapidly growing area and we are very much at the forefront in developing this market for our IFA customers.

Stellar AiM IHT Portfolio: Key features

- A diversified portfolio of 40 AiM listed companies
- Offers full inheritance tax relief after two years
- Available in an ISA and for ISA transfers
- 9 year performance record
- Wide availability on wrap platforms
- Low fees

Stellar AiM IHT Portfolio: Platform availability

- [Standard Life Wrap](#)
- [Transact](#)
- [Ascentric](#)



Over the coming weeks we will be producing a series of case studies and helpful guides to help you identify clients who may be suitable for inheritance tax planning.

Find out more [about Stellar](#) and [our services](#)

External Links

- [FCA sets out scope of Investment Platforms Market Study](#)
- [Asset Management Market Study](#)
- [Investment Platforms Market Study Terms of Reference](#)

Important Information

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