

## Stellar ICENI for Financial Advisers

Creating a natural pathway to estate planning services for your clients



This new service seamlessly combines specialist investment management with other expert estate planning professionals, to support advisers in providing the core advice disciplines required for the transfer of IHT-efficient wealth. It has been carefully designed to:

- Improve and enhance advisers' estate planning capability
- Help financial advisers unlock inter-generational planning opportunities
- Write more business in this area, increase referrals and generate new revenue

Our knowledgeable and independent experts are available to help financial advisers at whatever stage of the process they require assistance. From legal services including wills and trusts - to tax advisory, estate administration and investment management services. Additional expertise in offshore tax and overseas residency, UK and overseas trusts, long term care insurance and specialist pension services is also available.

### The Natural Choice

Stellar ICENI is ideal for financial advisers who do not currently have this expertise easily available, and who would like to strengthen and develop the estate planning element of their business. We believe that ICENI will support business growth and enable advisers to offer a market leading service for their clients.



“It became very apparent that to engineer really effective estate and succession planning required more than just financial advice. We realised that if we could bring together different professional expertise, and have those skill-sets actually in the room to support the financial adviser, then their client was going to be really well looked after.”

**Matthew Steiner**  
Corporate Director

### The Opportunity

Stellar ICENI has been developed in consultation with external partners, to help financial advisers build a holistic, inter-generational wealth strategy for their clients. In this 'Inheritance Generation', some £5.5 trillion\* is expected to pass between generations in the UK, between now and 2050. This presents an unrivalled opportunity for financial advisers to manage wealth on their clients' behalf, as it is disbursed from one generation to the next - significantly increasing the amount of funds under management.

### Stand Tall With Us

**If you are interested in growing your estate planning business, and offering a more complete service to your clients - please contact Matthew Steiner or one of the adviser team at Stellar, to see how we can work together.**

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Multiple elements. One estate planning service.

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\* Kings Court Trust, Passing on the Pounds.