

Stellar Growth IHT Service

Fund at a glance

Scheme Categorisation

Discretionary Managed Portfolio Service (MPS)

Scheme Strategy

Generalist growth and BR qualification

Target Return

£0.05 / 5% p.a net of fees

Investment Sector



Arable farming, Bridging finance,
Commercial forestry, Commercial
property development, Hotels,
Renewable energy, Residential
property development

Target Diversification

N/A

Nominee & Custody Arrangements

Custodian: Woodside Corporate Services Ltd
Receiving Agent: Woodside Corporate Ltd
Services Nominee: WCS Nominees Limited

Investment Objective

The Stellar Growth Inheritance Tax Service is structured unlike any of the other estate planning portfolios, because investors are put in complete control. The Investment Objective is to provide returns up to and above the target return of 5%. As well as, to qualify for relief from IHT through obtaining qualification for Business Relief.

On investment, Stellar establish a trading company for each investor – in a name of their choosing – and issue them 100% of the share capital. This capital will be spread across a range of different Investment Sectors, including UK Forests and Farms, Hotels, Bridging Finance, and Residential and Commercial Property Development; making it one of the most diverse services in the market in terms of the range of sectors on offer.

These qualifying business activities are secure, because investors' companies will own both the land and either the crops growing on it, or the bricks and mortar. Where capital is used for short-term lending purposes, such as Bridging Finance or Development Finance, it is secured against assets. Stellar employs specialist asset managers with extensive expertise in each of these sectors – and this careful and efficient management means that Stellar seeks to deliver its target returns, to maximise investment potential. Stellar continually sources and develops new sectors, to ensure investors can benefit from diversification in areas that provide a high level of security. In addition, they do not place caps on performance, so investor interests are fully aligned with those of their asset managers.

Exit Strategy

This is an evergreen service.

Fees

Fee type	Fees charged to Investor (including VAT)	Fees charged to Investee Companies (including VAT)
Initial fee	1.5%	n/a
Dealing fee	n/a	1.5%
Annual fee	n/a	1% +VAT
Performance fee	n/a	20% of performance above the target
Other fee information	0.5% +VAT Annual Admin Fee	2% exit fee

Kuber Special Arrangements

N/A

Need to know more? Get in touch:

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Fund Manager

Stellar Asset Management Ltd was established in 2007 by former Directors of Close Brothers Investment Limited. Stellar focuses predominantly on BR qualifying investments, and today has approximately £330 million under management, spread across both AIM quoted companies and private businesses operating across a variety of asset-backed sectors. We typically partner with third-party specialist/advisers to assist with the management of underlying assets and investments. Having been in operation for almost 13 years now, Stellar has a growing track of operation, and continues to grow organically in line with its AUM.

Important Notice

Please read the following information carefully as a professional adviser. The information contained in this document is for discussion purposes only for professional advisers and their clients, it is not for Retail Clients. EIS Portfolios are not suitable for all investors as the underlying investments are often illiquid and therefore high risk. Advice should always be sought from a professional adviser prior to investing. By proceeding through this document and accompanying Platform Guide you are agreeing to the terms and conditions. For purposes of compliance with the UK Financial Services and Markets ACT 2000 (FSMA), this material is communicated by Kuber Ventures; and the contents of this financial promotion have been approved for the purposes of section 21 of the FSMA Tax Efficient Procurement Services Ltd which is authorised and regulated by the Financial Conduct Authority (FCA) and it has its trading office at Linstead House, 9 Disraeli Road, London SW15 2DR. Kuber Ventures Limited advisors are all regulated by the Financial Conduct Authority and can be found on www.fca.gov.uk/fcaregister Kuber Ventures Limited FRN 574987 is an Appointed Representative of Tax Efficient Procurement Services Ltd which is authorised and regulated by the Financial Conduct Authority (FCA). Kuber Ventures Limited, 7 Bell Yard, London, WC2A 2JR. Registered number: 8693809, VAT: 175 9290 69.