



Wespath Institutional Investments (WII) has joined with Stellar Technology Solutions, LLC (Stellar) to offer a subaccounting solution that delivers a more efficient and personalized investment accounting and record-keeping experience.

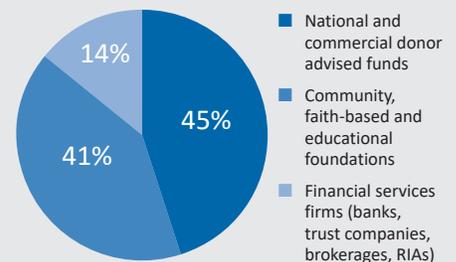
### About Stellar

Stellar is the leading provider of philanthropic fiduciary enterprise solutions and professional services.

- **Experience:** Founded in 1999
- **Charitable Assets Under Administration:** Over \$63 billion
- **Clients:** Exclusively focused on philanthropic fiduciaries—over 300 direct and private labeled clients in nearly all 50 states—97% client retention
- **Client Support:** Over 40 customer-facing subaccounting professionals

*As of December 31, 2020*

### Stellar Clients by Asset Type:



### Serving Your Subaccounting Needs



The Stellar iPhi™ (integrated philanthropy) subaccounting platform is offered through a **secure, online portal**



Designed to support the subaccount administration needs and nuances of **faith-based, not-for-profit institutions**



Improve **operational efficiency** without increasing staff size



Gain **real-time direct access** to your organization's accounts, as well as each of your client and donor accounts (subaccounts)



Subaccounts **updated daily** with performance and asset value information, allowing for better planned giving and portfolio control



Generates **custom account statements**

If your organization is interested in learning more about the subaccounting solution made available through Stellar, including pricing, please contact our Institutional Investment Services team at [investmentinfo@wespath.org](mailto:investmentinfo@wespath.org) or **847.866.4100**.

[wespath.com](http://wespath.com)

