

VANTAGE SETTLEMENT GROUP CONFIDENTIAL

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SERVICE MODEL & PROGRAM DESCRIPTION

Concierge Settlement Services for EB-5 Immigrant Investors

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THE PROBLEM VSG SOLVES

A Market Gap No One Has Addressed

Starting life in the United States requires more than a visa. After years of navigating the most complex immigration program in the United States — committing \$800,000 or more, coordinating legal counsel, and managing a process that demands patience and precision — EB-5 investors earn the right to build a permanent life in America.

What follows deserves the same level of professional organization. Yet no single organization has been designed specifically around the EB-5 investor family — one that understands the intersection of immigration status, financial profile, family priorities, and the practical requirements of establishing a home in a new country. The result: families piece it together themselves, relying on informal networks and fragmented services, at the most consequential moment of their transition.

VSG was built to change that. We exist because EB-5 investors deserve the same level of professional support after approval that they received from their attorneys and regional centers before it.

“Expert guidance and curated options — the investor chooses, VSG delivers.”

WHAT VSG IS

A Single, Comprehensive Settlement Program

Vantage Settlement Group (VSG) delivers a fully managed concierge settlement program exclusively for EB-5 immigrant investors, their spouse, and dependent children arriving in the United States. VSG coordinates every dimension of the family's transition — from pre-arrival planning through 180 days of active settlement — so that investors and their families can focus on building their new life rather than managing the logistics of it.

The VSG program is a single, comprehensive offering. Every VSG client receives the full program, personalized to their specific family, destination city, and lifestyle through the proprietary VSG Family Portrait before they depart their home country. There are no stripped-down entry-level packages and no services held back behind a higher price point. Every investor gets everything.

For investors whose needs extend beyond the standard program — multiple city settlements, phased family arrivals, or highly specialized support — VSG Custom is available, scoped and priced individually.

THE VSG DELIVERY NETWORK

Proven National Infrastructure

VSG's service delivery is built on a partnership with a national relocation and integration organization whose practice is built exclusively around foreign nationals and immigrant families. This is not a general relocation firm that also handles international clients — serving foreign nationals is the entirety of what they do. That specialization is the foundation of everything VSG delivers on the ground.

The professionals behind VSG’s delivery network include former U.S. diplomats, immigration attorneys, caseworkers, and relocation specialists — a vetted network of specialists assembled specifically because foreign national settlement demands expertise that cannot be borrowed from domestic relocation practice. This vetted network spans 40 U.S. states and serves clients from more than 130 countries.

7,000+ Immigrants Successfully Settled	130+ Countries of Origin	40 U.S. States Reached
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That depth of experience and geographic reach means VSG can serve EB-5 investors settling in virtually any U.S. destination market, with ground-level knowledge and vetted local provider networks already in place. VSG’s relationship with this organization is formalized under a service agreement — contracted infrastructure, not a referral arrangement.

THE VSG FAMILY PORTRAIT

Personalization Before Arrival

Every VSG client begins with the VSG Family Portrait — a comprehensive, thoughtfully curated proprietary intake process initiated well in advance of the family’s arrival and as early in the engagement as possible. The VSG Family Portrait captures the family’s goals, preferences, and needs across multiple dimensions and generates the VSG City Settlement Blueprint™: VSG’s proprietary, personalized, city-specific settlement plan that identifies vetted local providers and resources across every area of the family’s transition — housing, schools, healthcare, banking, community, and more — and delivers them a clear, structured roadmap before they depart.

By the time the family lands, housing options are confirmed, schools are shortlisted, a VSG coordinator is ready to meet them, and a clear 180-day roadmap is already in place. The VSG Family Portrait is what separates VSG from a generic relocation service — the difference between arriving with a plan and figuring things out as you go.

Family & Lifestyle Dimensions – Family composition – U.S. city and region preferences – Housing preferences and budget – School preferences (K–12) – Transportation needs – Healthcare requirements – Lifestyle and cultural preferences – Spouse professional background	Integration & Timing Dimensions – Language profile (all family members) – Cultural community preferences – Household services – Financial and banking preferences – Children’s activities and extracurriculars – Arrival timing and phasing
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Four Pillars of Comprehensive Settlement

The VSG Settlement Program is organized around four service pillars that together cover every dimension of the EB-5 family's transition. All four pillars are included in the standard program for every client. VSG provides expert guidance, curated options, and facilitated connections — the investor chooses, VSG delivers.

1	Housing & Settlement <i>A home is where the transition begins. VSG provides guidance and curated options so the family can make informed decisions at every step.</i> – Guidance on temporary and permanent housing options matched to your preferences and budget – Introductions to licensed real estate professionals in your destination market – Referrals to vetted moving, logistics, and transportation providers – Assistance with driver's license acquisition and banking setup guidance
2	Cultural & Community Integration <i>Feeling at home takes more than a street address. VSG connects your family with the community resources and social networks that make a new city feel like home.</i> – Referrals to ESL and language training programs matched to each family member – Cultural orientation guidance and community engagement introductions – Assistance navigating banking, healthcare, and social services – Practical guidance on everyday U.S. life in your destination city
3	Family Relocation Support <i>VSG guides your family through every practical step of establishing your household — school options researched, healthcare providers identified, and community connections underway.</i> – Guidance on school options and assistance through the enrollment process – Introductions to family healthcare providers suited to your family's profile – Community networking introductions to help family members build connections – Ongoing integration support and check-ins throughout the 180-day program
4	Employment & Professional Support <i>The investor's future is also the family's future. Where desired, VSG provides optional career guidance and optional professional introductions to help the investor and their spouse hit the ground running.</i> – Pre-arrival and post-arrival professional onboarding guidance – Career guidance and professional networking introductions for family members – Career development resources and mentorship connections – U.S. workplace orientation and best practices

SERVICE STANDARDS & ACCOUNTABILITY

Upon receipt of the enrollment deposit, VSG sends the client the VSG Family Portrait Profile Builder™ — VSG’s proprietary intake tool. We complete the VSG Family Portrait as early in the engagement as possible, so that it can be returned to the client for review and confirmation, and then transmitted to our delivery network well in advance of arrival. The earlier we complete this process, the better prepared the program will be.

VSG operates under defined service standards for every program engagement. In the event a service component cannot be fulfilled as described, VSG will notify the investor promptly and provide an equivalent alternative or a pro-rata adjustment to the settlement fee.

HOW YOUR PROGRAM WORKS

Enrollment in the VSG Settlement Program follows a straightforward sequence, designed to get the program fully prepared well before the family departs their home country.

1	Consultation Call The engagement begins with a consultation call between the investor family and VSG. This conversation establishes the family’s destination city, timeline, household composition, priorities, and any specific needs or circumstances. VSG uses this call to confirm the program is the right fit and to answer any questions before enrollment proceeds.
2	Enrollment & VSG Family Portrait Upon receipt of the enrollment deposit, VSG sends the family the VSG Family Portrait Profile Builder™ — VSG’s proprietary intake tool that captures the complete picture of the family’s goals, preferences, and requirements across housing, schools, healthcare, community, professional priorities, and more. VSG completes the VSG Family Portrait as early in the engagement as possible and returns it to the family for review and sign-off. Once the family confirms the Portrait, VSG builds the VSG City Settlement Blueprint™ from the confirmed Portrait.
3	VSG City Settlement Blueprint The VSG City Settlement Blueprint™ is VSG’s proprietary, personalized settlement plan built directly from the confirmed VSG Family Portrait. Once complete, the VSG City Settlement Blueprint™ is sent immediately to the delivery network to begin preparation, and simultaneously delivered to the family so they are fully informed and engaged throughout the process. The Blueprint maps every dimension of the family’s settlement to vetted local providers and resources in their destination city: temporary and permanent housing options, shortlisted schools matched to the children’s profiles, healthcare providers, banking and administrative setup, community and cultural resources, and a structured 180-day engagement calendar. The Blueprint is what the family arrives with. It is not a welcome packet — it is a working plan.

4

180-Day Active Settlement

From the moment the family lands, a dedicated VSG coordinator is in place to guide every step of the settlement process. Day-of-arrival private transportation is arranged and coordinated. Over the following 180 days, the coordinator works through every component of the City Settlement Blueprint with the family — adjusting as circumstances evolve and ensuring nothing falls through the cracks.

PROGRAM PRICING

VSG SETTLEMENT PROGRAM

A one-time settlement fee is quoted following your consultation call.

*One-time fee per family | Day-of-arrival transportation included | 180-day program
A refundable enrollment deposit is required at the time of enrollment, credited in full toward the settlement fee.*

What the fee covers

- Full 180-day active settlement program
- All four service pillars — complete
- VSG Family Portrait and City Settlement Blueprint
- Day-of-arrival private transportation
- Dedicated VSG coordinator throughout

How pricing works

- One-time fee — not a subscription or retainer
- Per family unit — not per individual
- Solo arrival first: program activates at first arrival; family arrival coordinated through the same program
- A refundable enrollment deposit is required at the time of enrollment, credited in full toward the settlement fee

For investors with specialized needs, **VSG Custom** is available — scoped and priced individually.

OPTIONAL ADD-ON: U.S. FINANCIAL PLANNING

Proxy Wealth Advisors

For investors who want to pair professional financial planning with their settlement program, VSG offers an optional introduction to Proxy Wealth Advisors — a specialized international wealth management team whose entire practice is built around immigrant families making the transition to U.S. financial life.

Learn more: proxyfinancial.com

“Investors need an immigration plan. And they need an immigration financial plan.”

What the investor receives – Comprehensive written U.S. financial plan covering taxes, retirement, insurance, investments, and estate planning – Cash flow and net worth projections – Visual household Asset Map – Quarterly accountability reviews The advisory team Specialized international wealth team: cross-border planning, pre- and post-immigration tax strategy, Series 65 licensed advisors, fiduciary standard. Immigrant families are their exact practice.	How it works – Optional — investor elects at VSG Family Portrait intake – No additional cost to the investor — bundled into the VSG settlement fee – VSG facilitates the introduction only; all financial information flows directly to Proxy Wealth under a separate agreement – VSG is not in the financial data flow Billing – Proxy Wealth Advisors is invoiced to VSG per opt-in family — the investor never receives a bill from Proxy.
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VSG CUSTOM

For Investors With Specialized Needs

VSG Custom is available for investors whose settlement needs go beyond the standard program. If your family is settling in multiple U.S. cities, arriving in phases over time, or requires services that fall outside the standard program scope, VSG Custom is how we work with you.

VSG Custom is not a package — it is a conversation. You describe what you need. VSG scopes the program. We price it accordingly. There is no ceiling on what we can provide.

VSG Custom may be right for investors who:

- Are settling in multiple U.S. cities simultaneously
- Have family members arriving at different times and need a phased program
- Require a dedicated named VSG coordinator available around the clock
- Need specialized services not covered in the standard program
- Simply prefer a program designed entirely around their family from the ground up

To explore VSG Custom, contact the VSG founding team directly — contact information is on the final page of this document.

THE VSG FOUNDING TEAM

VSG was founded by Geoff Taylor, a fifteen-year veteran of the EB-5 industry with deep experience across regional center operations, investor relations, and program advisory work. Geoff has worked directly with EB-5 investors and their families across the full arc of the immigration process — from initial capital deployment through conditional and permanent residency — and built VSG around a single observation: the industry does an exceptional job bringing investors to approval, and almost nothing to support what comes next.

Geoff's industry relationships run deep. He has known the founders of PRXY, the leading fund administrator for EB-5 and private investment programs, for a decade, and has maintained close professional ties across the regional center, legal, and investor relations communities throughout that

time. Those relationships are what make VSG's delivery network and partner integrations possible at launch.

VSG fills the post-approval gap with the same level of professional rigor investors experienced on the way in. The program is designed by someone who understands how EB-5 investors think, what they have been through, and what a genuinely successful U.S. transition requires — not as a theory, but from fifteen years inside the industry.

INVESTOR DATA & CONFIDENTIALITY

VSG treats all investor data as strictly confidential. Information shared through the VSG Family Portrait is used solely to deliver settlement services to the investor and their family. No investor data is shared with third parties beyond VSG's vetted delivery network, and only to the extent necessary to fulfill the program.

VANTAGE SETTLEMENT GROUP

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For program inquiries, VSG Custom consultations, or partnership discussions, contact the VSG founding team directly.

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