Vantage Settlement Group

EB-5 IMMIGRANT INVESTOR CONCIERGE

SERVICE MODEL & PROGRAM DESCRIPTION

Earning Your Visa Was the First Step. Building Your Life in America Is the Next.

The 180-day concierge arrival and settlement program built exclusively for EB-5 immigrant investors and their families.

NOVEMBER 2026

7,000+	130+	40
FAMILIES SUCCESSFULLY SETTLED	COUNTRIES OF ORIGIN	U.S. STATES COVERED

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 is that families piece it together themselves, relying on informal networks and fragmented services, at the most consequential moment of their transition.

EB-5 investors deserve the same level of professional support after approval that they received from their attorneys and regional centers before it.

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 the family can focus on building their new life rather than managing the logistics of it.

Every VSG client receives the full program, personalized to their family, destination city, and lifestyle through the proprietary VSG Family Portrait™. There are no stripped-down entry-level packages and no services held back behind a higher price point. Every investor gets everything. For needs beyond the standard program, VSG Custom is available, scoped and priced individually.

Expert guidance and curated options. The investor chooses, VSG delivers.

THE VSG SETTLEMENT AND DELIVERY NETWORK

Proven Infrastructure for Global Families

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.

VSG's relationship with this organization is formalized under a service agreement: contracted infrastructure, not a referral arrangement.



1 **Expert Team**
Former U.S. diplomatic staff, experienced caseworkers, and relocation specialists, assembled because foreign national settlement demands expertise that cannot be borrowed from domestic relocation practice.

2 **Multilingual Capability**
Support in Mandarin, Cantonese, Hindi, Korean, Vietnamese, and Arabic.

3 **Broad Reach**
Operations in 40 U.S. states, including the major EB-5 investment markets, with vetted local provider networks already in place.

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THE VSG FAMILY PORTRAIT™

Personalization Before Arrival

Every VSG client begins with the VSG Family Portrait™, a comprehensive, proprietary intake process started as early in the engagement as possible. It captures the family's goals, preferences, and needs and generates the VSG City Settlement Blueprint™: a personalized, city-specific settlement plan that identifies vetted local providers and resources across every area of the family's transition, delivered as a clear, structured roadmap before they depart.

By the time the family lands, housing options are confirmed, schools are shortlisted, private transportation to their housing is arranged, and a clear 180-day roadmap is in place. It is the difference between arriving with a plan and figuring things out as you go.

FAMILY & LIFESTYLE

- 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

- Language profile (all family members)
- Cultural community preferences
- Household services
- Financial and banking preferences
- Children's activities and extracurriculars
- Arrival timing and phasing

WHEN TO ENROLL

Earlier Is Better

Most families enroll after I-526E approval, once the path to a visa is clear. Early conversations are welcome: understanding your city options, school priorities, and housing needs before approval means your City Settlement Blueprint™ is ready to execute the moment your visa is issued. Families adjusting status from inside the U.S. are equally welcome at any stage.

WHAT VSG DELIVERS

The Four Pillars of U.S. Settlement

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.



Housing & Settlement

A home is where the transition begins.

- Temporary and permanent housing options matched to your preferences and budget
- Introductions to licensed real estate professionals
- Referrals to vetted moving and logistics providers
- Driver's license and banking setup guidance



Cultural & Community Integration

Feeling at home takes more than a street address.

- ESL and language training matched to each family member
- Cultural orientation and community introductions
- Help navigating healthcare and social services
- Practical guidance on everyday U.S. life



Family Relocation Support

Every practical step of establishing your household.

- School options and help through enrollment
- Family healthcare providers suited to your profile
- Community connections for every family member
- Check-ins throughout the 180-day program



Professional Support

The investor's future is also the family's future.

- Optional pre- and post-arrival professional onboarding
- Career guidance and networking introductions
- Career development resources and mentorship
- U.S. workplace orientation and best practices

HOW YOUR PROGRAM WORKS

The Structured Path to U.S. Integration

BEFORE YOU ENROLL

Consultation Call

A call with VSG to establish your destination city, timeline, household, priorities, and any specific needs, and to confirm the program is the right fit. Families who enroll secure their place with a deposit and choose when to begin.

01

PRE-ARRIVAL INTAKE

The VSG Family Portrait™

When your family is ready to begin, VSG sends a secure link to the VSG Family Portrait™ on receipt of the start payment. Your family completes it online through Jotform and returns it no later than 120 days before arrival, unless special arrangements have been made with VSG.

02

CUSTOM ADVISORY PLAN

The City Settlement Blueprint™

Built from the confirmed Portrait: housing options, schools matched to each child, healthcare providers, banking and administrative setup, community resources, and a 180-day calendar. It goes to the family first and is refreshed at no charge as plans change. A final refresh goes to the settlement and delivery network 90 to 120 days before arrival. It is not a welcome packet; it is a working plan.

03

WHITE-GLOVE WELCOME

Day-of-Arrival Greeting

Private transportation takes your family from your point of entry to your confirmed housing. On special request, your VSG coordinator can meet you on arrival and take you by private car to your housing.

04

CONTINUOUS MANAGEMENT

180-Day Active Settlement

Your VSG coordinator works through every part of the Blueprint with your family over six months, adjusting as circumstances evolve and making sure nothing falls through the cracks.

PROGRAM PRICING

Investment in Seamless Integration

VSG SETTLEMENT PROGRAM

Fees Available on Consultation

One-time fee per family, quoted after your consultation call

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 to your housing
- ✓ VSG coordinator assigned 90–120 days before arrival
- ✓ Optional U.S. financial plan from Proxy Wealth Advisors
- ✓ Covers investor, spouse, and direct dependents
- ✓ Referrals to licensed insurance and automobile brokers
- ✓ Other household members are welcome; we plan housing around them, and services for them can be added through VSG Custom.

HOW PRICING WORKS

- One-time fee, not a subscription or retainer
- Per family unit, not per individual
- Solo arrival first: the program activates at first arrival, and later family arrivals within 180 days are coordinated under the same program
- Paid in three stages: an enrollment deposit, a start payment when your family begins planning, and a final payment 30 days before arrival
- The deposit is refunded in full if your I-526E petition is denied before your family starts; other refund terms are set out in the enrollment agreement
- Housing and other third-party costs such as lease deposits, tuition, and vehicle purchases are paid directly by the family

SERVICE STANDARDS & ACCOUNTABILITY

Defined Standards for Every Engagement

VSG operates under defined service standards for every program engagement. If 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.

VSG CUSTOM

For Families With Specialized Needs

VSG Custom is for families whose needs go beyond the standard program. It is not a package; it is a conversation. You describe what you need, VSG scopes the program after a pre-engagement assessment, and it is priced individually.

- ✓ Phased arrivals & multi-city setups
- ✓ Dedicated full-time VSG coordinator
- ✓ Corporate housing entity setup
- ✓ Enhanced security & medical staff coordination
- ✓ Custom administrative & compliance research
- ✓ Extension beyond the 180-day program

OPTIONAL: U.S. FINANCIAL PLANNING

Settlement + Cross-Border Wealth Strategy

For families who want professional financial planning alongside their settlement program, VSG offers an optional introduction to Proxy Wealth Advisors, a fiduciary registered investment advisor whose practice is built around immigrant families making the transition to U.S. financial life. Learn more at proxyfinancial.com.

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

WHAT THE FAMILY RECEIVES

- A comprehensive written U.S. financial plan covering taxes, retirement, insurance, investments, and estate planning
- Cash flow and net worth projections
- A visual household Asset Map
- Quarterly accountability reviews

HOW IT WORKS

- Optional: elected at VSG Family Portrait™ intake
- No additional cost to the family
- Delivered by a fiduciary specializing in cross-border and pre- and post-immigration tax planning
- VSG makes the introduction only. Your financial information goes directly to Proxy Wealth Advisors under a separate agreement, and VSG does not see it

LEADERSHIP

Founded by Geoff Taylor

15+ YEARS OF EB-5 INDUSTRY LEADERSHIP

VSG was founded by Geoff Taylor, a fifteen-year veteran of the EB-5 industry with experience across regional center operations, investor relations, and program advisory work. Geoff has worked 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 has long-standing relationships across the regional center, legal, and investor relations communities. VSG brings the same professional standard to life after approval that investors had on the way in, designed by someone who understands what EB-5 families have been through and what a successful U.S. transition takes.

INVESTOR DATA & CONFIDENTIALITY

Your Information Is Protected

Your family completes the VSG Family Portrait™ online through Jotform, a widely used, secure forms platform, with no email attachments or paper forms. Your answers are encrypted when you submit them and while they are stored. They are seen only by our team and our settlement and delivery partner, and service providers receive only what they need to do their part. Your information is used only to plan your family's move: never sold, and never shared for marketing. You can ask to see, correct, or delete it at any time, subject to our record-keeping obligations.

CONTACT

Ready to Plan Your Family's U.S. Arrival?

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8 AM – 6 PM Pacific, or by appointment

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