STRATEGIC ADVISORY

VANGUARD STRATEGY PARTNERS

Overview of Scope, Process, and Terms of Our Strategic Advisory Services

1. About Us — Your Partner on the Route 66 of Transformation

Headquartered in New Mexico with international partner offices and representations in Europe and Asia, Vanguard Strategy Partners has been supporting medium-sized enterprises (SMEs), owner families, and management teams since 1990—strategically, discreetly, and sustainably.

Much like the legendary Route 66, we accompany our clients step-by-step through complex business phases. Our focus lies on fostering long-term growth, mitigating structural risks, and securing corporate values across borders.

2. Scope of Advisory Services

Our core capabilities are structured into five strategic pillars tailored to modern mid-market needs:

01. Corporate Finance & Structures
Optimizing corporate frameworks, succession planning, asset protection, and capital structuring for sustainable growth or restructuring phases.

02. Relocation & Nearshoring
Developing robust location strategies, conducting economic potential analyses, and managing international corporate cross-border relocations.

03. Alignment, People & Performance
Defining future-proof organizational roles, aligning workforces with common corporate visions, and establishing transparent, measurable goals.

04. Process Excellence & Governance
Eliminating operational bottlenecks, implementing standardized corporate governance, and ensuring a highly consistent corporate identity.

05. Digital Workplace & Organization
Deploying advanced tools for secure remote collaboration, rigorous data cleaning, and systematic document archiving including full DATEV Cloud migration capabilities.

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3. Advisory Process & Workflow

Every mandate undergoes a highly systematic four-stage transformation workflow to ensure complete alignment and measurable success:

- **Phase 1: Confidential Intake & Briefing** – Personal initial assessment of your requirements, strategic goals, and constraints under a strict non-disclosure agreement.
- **Phase 2: Diagnostic & Architecture** – In-depth structural audit of existing processes, finances, or structures to formulate a tailored strategic blueprint.
- **Phase 3: Operational Deployment** – Close collaboration with your executive team and ownership families to roll out new frameworks and structural shifts.
- **Phase 4: Controlling & Milestone Review** – Independent monitoring of performance indicators (KPIs) to verify long-term stability and ROI.

4. Engagement Terms & Mandate Framework

We believe in absolute transparency and customize our fee structures to the scope and complexity of each corporate mandate:

- **Project-Based Fixed Fees:** Transparent, predefined flat fees for clearly defined project scopes such as corporate restructurings or relocation setups.
- **Monthly Advisory Retainers:** Ideal for long-term strategic guidance, ongoing board-level counseling, and continuous organizational transformation.
- **Success-Oriented Components:** Performance-tied success fees tied to clear, quantifiable targets for specialized transactional mandates.

5. Global Presence & Contact

Reach our advisory team globally through our dedicated communication lines or visit our regional representations: