A Global Business Consortium
Your Virtual Sales Team

Strategic Partner Group

Strategic Partner Group Prospectus

For Accounting Firms, Financial Planners & Advisory Practices

1. Overview

Strategic Partner Group (SPG) is a global consortium and capital facilitation firm that bridges the gap between financial advisors, accountants, and their clients' funding objectives.
We partner with financial professionals to deliver *capital access solutions*, *growth funding strategies*, and *international investment partnerships* for their business clients — from **$5 million to $200 million+**.

"SPG empowers accountants and financial planners to extend beyond advisory — into opportunity creation."

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2. Why Partner with SPG

Accounting and financial planning firms are trusted advisors at the center of business decision-making. Yet, many clients outgrow traditional funding channels and require access to institutional or global capital.
SPG provides the missing bridge — helping you deliver capital readiness and funding introductions through a partnership that enhances your firm's value and strengthens client relationships.

Partner Benefits

- 💼 *Expand Service Offerings*: Add Capital Sourcing, Business Development, and Investor Relations to your advisory toolkit.
- 🌍 *Global Capital Access*: Tap SPG's network of **private equity, venture capital, family offices, and sovereign funds**.
- 💰 *Revenue Participation*: Earn referral and performance-based fees for qualified introductions.
- 🤝 *Client Retention & Growth*: Offer clients a clear path to funding, partnerships, and expansion.

- 🧩 *Co-Branding & Collaboration*: Position your firm as a *Capital Advisory Partner* under the SPG consortium umbrella.

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3. Core Funding & Strategic Services

A. Capital Access & Investor Alignment

- Sourcing capital from $5M–$200M+ for startups, scale-ups, and mature enterprises
- Alignment with institutional and private investment partners worldwide
- Tailored introductions based on sector, stage, and funding objectives

B. Investment Packaging & Readiness

- Preparation of investor-ready financial documents, valuation models, and pitch decks
- Structuring of equity, debt, and blended capital frameworks
- Assistance in due diligence, financial modeling, and compliance review

C. Strategic Partnerships & Joint Ventures

- Facilitation of mergers, acquisitions, and international expansion
- Public–private partnership (PPP) coordination for infrastructure and impact projects
- Co-branded consortium development for recurring investment flows

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4. SPG Advisor Integration Model

Stage	Firm Role	SPG Role	Outcome
Discovery	Identify clients needing capital or expansion	Assess funding viability	Funding readiness roadmap
Preparation	Provide financial data, projections	Package investor materials	Investor-grade documentation
Introduction	Maintain client relationship	Facilitate investor outreach	Qualified investor match
Negotiation	Provide advisory insights	Manage investor discussions	Transaction execution
Completion	Monitor results	Track funding outcomes	Shared success, long-term partnership

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5. Industries We Serve

SPG supports clients across diverse sectors, including:

- Infrastructure, Energy & ESG Projects
- Healthcare, Biotech, and Pharma
- Technology, SaaS, and Fintech
- Real Estate Development and Hospitality
- Manufacturing, Logistics, and Agriculture

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6. The SPG Advantage

- 🌐 **Global Reach** – Direct access to over 500 vetted investor relationships worldwide
- ⚙️ **Integrated Process** – Turnkey deal packaging and execution support

- 🧭 **Advisory Alignment** – Seamless integration with your firm's financial advisory services
- 🔷 **Ethical Partnership** – Transparent, compliant, and mutually beneficial engagements

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7. Leadership

Sam Jacobs, President — Investment Strategist & Global Capital Facilitator with over $500M in structured international projects.
Rick Reese, Founder and COO — 35 years' experience in business development, M&A, and procurement strategy, leading SPG's global partnerships and transaction logistics.

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8. How to Collaborate

1. Schedule an introductory call with SPG's Capital Access Division.
2. Sign a referral or partnership agreement.
3. Begin referring clients for funding review.
4. Participate in revenue-sharing from closed transactions.

Contact

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📍 Global Headquarters: New York, USA

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Outreach Email for Accounting Firms & Financial Planners

Subject: Expand Your Advisory Services — Help Clients Secure $5M–$200M+ in Funding

Body:

Dear [Name],

I hope this note finds you well.

I'm reaching out to introduce **Strategic Partner Group (SPG)** — a global consortium specializing in connecting businesses with funding sources from **$5 million to $200 million+** through our worldwide investor network.

SPG partners with accounting firms and financial planners like yours to help clients access the capital they need for growth, expansion, and acquisition—while strengthening your firm's advisory value and creating new revenue opportunities.

Our services include:

- Global capital sourcing & investor matchmaking
- Investment packaging, pitch deck, and valuation preparation
- Deal structuring for equity, debt, or blended funding
- Strategic partnerships and international joint ventures
- Transparent referral & revenue-sharing model

If your firm supports clients who are raising capital or expanding operations, SPG can be your trusted partner for investor access and transaction facilitation.

Would you be open to a short conversation about how our collaboration model could fit your advisory practice?

Warm regards,
Sam Jacobs
President | Strategic Partner Group
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