Evolved Strategic Alliance

Together, we can help clients navigate complexity, seize opportunities, and move forward with confidence.

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Success Through Teamwork

Strong client relationships are built on trust, expertise, and the ability to bring the right specialists to the table when needed.

The Evolved Strategic Alliance connects trusted advisors and their clients with specialized tax expertise to help them navigate complex challenges and opportunities.

Through strategic partnerships, we work alongside professionals across legal, financial, advisory, and consulting disciplines to deliver comprehensive solutions while strengthening the relationships these specialists have built with their clients.

The Evolved Strategic Alliance is founded on collaboration, mutual respect, and a shared commitment to exceptional client service.

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Become a Partner

Who We Partner With

The Evolved Strategic Alliance is designed for organizations and professionals who serve growing businesses, investors, business owners, and High Net Worth Individuals.

Our alliance partners commonly include:

- Wealth Advisors, Money Managers, and Registered Investment Advisors
- Family Offices
- Advisory and Consulting Firms
- Private Equity and Venture Capital Firms
- Audit and Assurance Firms
- Law Firms
- Transaction Advisory Firms

Whether your clients are preparing for growth, managing risk, pursuing a transaction, or navigating complex tax matters, the Evolved Strategic Alliance can serve as a trusted extension of your advisory network.

Who Makes an Ideal Alliance Partner

The Evolved Strategic Alliance is designed for organizations that regularly advise businesses and individuals facing complex financial, operational, transaction, and tax-related decisions.

Ideal partners serve clients that may encounter specialized tax matters during periods of growth, expansion, investment, acquisition, or organizational change.

Common Referral Opportunities

Mergers and Acquisitions

Consider partnering with Evolved when:

- Clients consider buying or selling a company
- Multi-State operations are involved
- Tax due diligence is required
- Transaction structuring questions arise
- Private Equity participation is anticipated

State and Local Tax

Consider partnering with Evolved when:

- Clients expand into new states
- Remote workforce growth creates nexus concerns
- Sales tax obligations become more complex
- State registration requirements are unclear
- Nexus exposure has been identified

Audit and Assurance Clients

Consider partnering with Evolved when:

- Independence considerations limit service capabilities
- Specialized tax expertise is required
- Complex compliance issues emerge
- Transaction-related tax support is needed

Law Firms

Consider partnering with Evolved when:

- Clients consider buying or selling a company
- Business owners are preparing for an exit
- Transactions require tax due diligence
- Clients are restructuring entities or ownership
- Multi-State tax exposure may impact a transaction
- Estate or succession planning involves business interests
- Private Equity investment or recapitalization is under consideration
- Specialized tax expertise is required to support legal strategy

Wealth Advisors, Money Managers, and Registered Investment Advisors

Consider partnering with Evolved when:

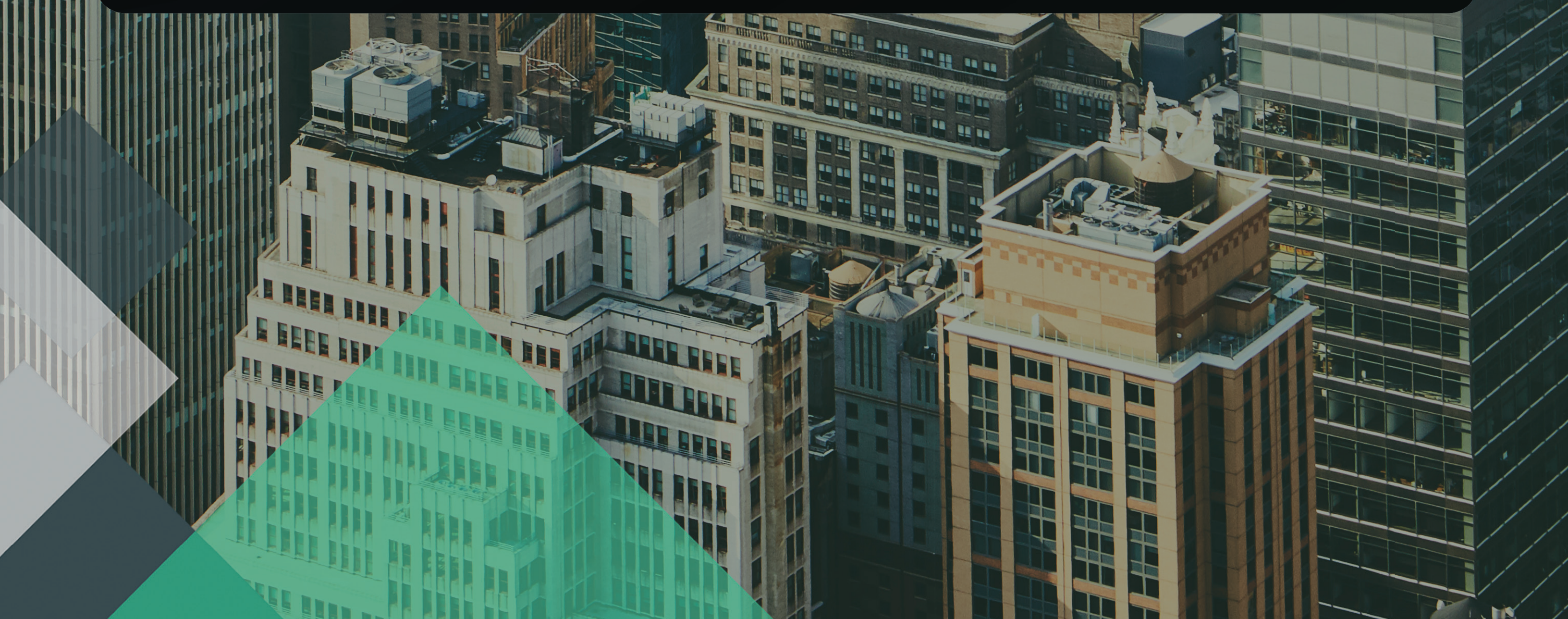
- Clients experience a significant liquidity event
- Business owners are preparing for an exit
- Private Equity or venture capital investment is involved
- Tax efficiency becomes a major planning concern
- Wealth transfer strategies are being evaluated
- State tax residency planning becomes important
- Concentrated stock positions create tax challenges
- Complex ownership structures exist
- High Net Worth clients require specialized tax planning
- Significant changes in income or net worth occur

Red Flag Checklist

If any of the following situations apply, it may be an appropriate time to engage with Evolved:

- ☐ Client operates in multiple states
- ☐ Acquisition or sale is planned
- ☐ Private Equity investment is involved
- ☐ Revenue growth accelerates rapidly
- ☐ Potential tax exposure has been identified
- ☐ Sales tax obligations are expanding
- ☐ Nexus concerns have emerged
- ☐ Transaction due diligence is required
- ☐ Internal tax resources are limited

The earlier specialized tax considerations are identified, the greater the opportunity to reduce risk, improve planning, and support better business outcomes.



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How the Engagement Works

The Evolved Strategic Alliance model is intentionally simple and designed to create value for organizations and their clients.

Identify an Opportunity

A client encounters a challenge or opportunity that may benefit from specialized tax expertise.

Common examples include:

- Tax Due Diligence
- Mergers and Acquisitions
- State and Local Tax (SALT) matters
- Nexus Studies and Compliance reviews
- Business restructuring
- Private Equity Transactions
- Growth into new markets
- High Net Worth Tax Planning
- Venture Capital and Startup Advisory
- General Tax Compliance

The Evolved Strategic Alliance is a mutually beneficial referral program with no additional costs or exchange of funds involved.

Make an Introduction

When an opportunity is identified, the partner introduces the client to Evolved. This can occur through an email introduction, phone call, or joint meeting.

Discovery and Assessment

The Evolved team conducts an initial discovery process to understand the client's goals, challenges, and requirements.

Where appropriate, we collaborate closely with the referring partner to ensure a complete understanding of the client's situation.

Deliver Specialized Support

Evolved works directly with the client under the Evolved brand while maintaining open communication with the referring partner throughout the engagement.

Evolved complements, rather than replaces, the existing advisor relationship and provides expertise that supports the broader client strategy.

Strengthen Long-Term Relationships

Successful engagements create stronger outcomes for everyone involved.

Clients receive specialized support, partners expand the value they deliver, and both organizations strengthen their position as trusted advisors.

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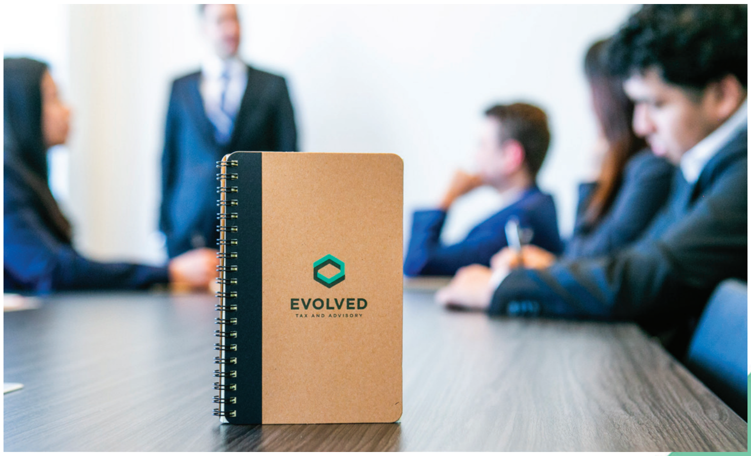
Benefits of the Evolved Strategic Alliance

Expand Your Advisory Network and Enhance Client Value

Gain access to a team of experienced tax professionals capable of supporting complex client needs without the need to build additional internal resources.



Priority Access to Our Proprietary Portal

Gain priority access to our proprietary portal, providing a centralized hub for resources, updates, referral support, and streamlined collaboration with the Evolved team.

Strengthen Client Relationships

Demonstrate your commitment to delivering comprehensive solutions by connecting clients with trusted specialists when appropriate.

Collaborative Approach

Work alongside a team that respects existing advisor relationships and values transparent communication throughout every engagement.

Reciprocal Opportunities

Opportunities for mutual referrals and expanded professional relationships across complementary service areas and among members of the Evolved Strategic Alliance.

Access to Specialized Expertise

Partners gain access to knowledge and support across areas, including:

- State and Local Tax (SALT)
- Transaction Advisory
- Tax Due Diligence
- Income Tax Provision Support
- Private Equity and Venture Capital Tax Advisory
- High Net Worth Tax Planning
- Business Tax Strategy
- Complex Tax Compliance

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Why Partner With Evolved

The most successful advisors understand that no single organization can be everything to every client.

Clients increasingly face challenges that require specialized expertise across multiple disciplines. The ability to bring together trusted professionals creates stronger outcomes and deeper client relationships.

At Evolved, we believe a partnership should create value for all involved.

We work collaboratively, communicate openly, and respect the trust that our partners have earned with their clients.

The role of the Evolved Strategic Alliance is not to replace existing advisors, but rather to strengthen the team surrounding the client by providing specialized tax expertise when it matters most.

Together, we can help clients navigate complexity, seize opportunities, and move forward with confidence.

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