Next Era LEGAL

CASE STUDY · CORPORATE & BUSINESS · SEVERAL INTERNATIONAL INVESTORS, REFERRED BY AN IMMIGRATION ATTORNEY

Cross-Border Growth, Protected Status.

The investors were seeking U.S. green cards through a business investment pathway, and their immigration status was tied to an active business they had invested in. Then its manager wanted a loan.

CLIENT	REFERRED BY	STATUS TIED TO	TRIGGER
International investors	**Their immigration attorney**	**An active business they had invested in**	**A loan sought by the business's manager**

01 THE SITUATION

A document review *that became a negotiation.*

An immigration attorney reached out to us on the investors' behalf. What began as a simple document review escalated into a complex, multi-party scenario.

01
A loan that rewrote the documents

The business's manager wanted a loan, which triggered revisions to key corporate documents.

02
Status at risk

Those changes threatened the structure the investors' immigration status required.

03
Two sets of priorities

Business expansion and compliance with U.S. immigration requirements were pulling in different directions.

02 OUR APPROACH

Three parties, *one structure.*

> ***We immediately expanded our role beyond transactional review.***

1 Worked with immigration counsel

Collaborated with the immigration attorney to understand and preserve the investors' immigration eligibility.

2 Analyzed the structure

The downstream legal and financial risk of the proposed structure, translated between the business goals and the immigration requirements.

3 Renegotiated the loan

Negotiated with the business manager to restructure the loan agreement into a refinancing package that preserved the investors' ownership and rights.

4 Revised the documents

The operating agreement and company documents, revised to reflect investor protections.

03 WHAT HAPPENED

Status intact, *capital unlocked.*

The immigration status of the clients remained fully intact. The business successfully refinanced, unlocking growth funds, and immigration, legal and business goals were brought into alignment. Next Era Legal became a trusted partner for ongoing cross-border legal guidance.

THE TAKEAWAY

When legal strategy intersects with immigration and investment, the stakes multiply. The work was not only to review the documents, but to align the outcomes for everyone involved.

04 WHO HANDLED IT

Talk to the attorneys *who handled it.*



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05 OTHER ENGAGEMENTS

JOINT VENTURE

Unlocking growth without capital

A joint venture in place of a raise a new project seemed to need.

EMPLOYEE INCENTIVES

Growth without dilution

Rewarding a growing team without the founder giving up equity.

REGULATED TECHNOLOGY

Built to scale, compliant from day one

Formation, regulation and investment for a technology platform.

EIGHT LOCATIONS, ONE TEAM

Los Angeles
(310) 734-4791

Orange County
(949) 209-4184

San Diego
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San Francisco
(650) 374-1337

Houston
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