

Proposal: ARM, Aircraft Relationship Management

A unified market intelligence platform for The VanAllen Group

System 1: Foundation, the All-Fleet Source of Truth

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1. Executive Summary

The VanAllen Group runs world-class market intelligence on top of fragmented infrastructure. Two paid data subscriptions (AMSTAT, Aircraft Post), one paid-but-unused API, a researcher spending four-plus hours a day reconciling spreadsheets by hand, institutional knowledge stranded in email threads and message history, and client deliverables built from screenshots.

What you described in our May conversations, and what your team confirmed in the July 21 walkthrough, is a firm whose intelligence and judgment are world-class, and whose tooling is making that intelligence harder, slower, and more error-prone to deliver than it needs to be.

ARM (Aircraft Relationship Management) is the platform that fixes this. We build it system by system. Each system is a focused, deployable AI workflow that solves one specific painful task and delivers a visible win. You commit to one system at a time.

This proposal commits to System 1: ARM Foundation, the fuselage. A unified, queryable, automatically synced database covering all 40 of your tracked aircraft markets, with an interactive web interface, source-of-truth reconciliation across AMSTAT and Aircraft Post, VanAllen's own research as a first-class source with manual override, and thirteen Day 1 outputs: seven real-time dashboards and six report templates.

Beyond System 1, this document describes a **proposed Continuous Evolution option**: one major capability per quarter, committed one quarter at a time, never auto-renewed. It is a proposal, not a commitment. **The fuselage is the only commitment in front of you right now.** After Year 1, the next step is a conversation each quarter about what, if anything, to build next. You control the pace, and you can stop at any quarter boundary.

2. The Business Case

Your researcher's current manual workflow, 30 to 90 minutes per cycle, three to four times per day, represents approximately **four hours per day of manual data reconciliation**. At a fully loaded research-role cost of roughly \$35 per hour, that is **~\$35,000 per year** of internal time absorbed by a workflow ARM eliminates.

System 1 eliminates the workflow entirely: the reconciliation, the cross-referencing, the screen-by-screen comparison, the spreadsheet manipulation, the Excel exports. Both AMSTAT and Aircraft Post are integrated directly via their APIs. Brooke's manual reconciliation workflow goes away end to end. Her time becomes high-value: adding notes, resolving the rare reconciliation conflict, and applying VanAllen's judgment as override rules. Work that compounds, rather than work that repeats.

How the economics work. Year 1 is the investment year: the annual contract bundles in the build, so you are paying for the system to exist while you are using it. Year 2 onward is where the platform economics show their real shape: the build is paid off, you are paying only for ongoing operation, and the time savings alone return roughly 3.2x on the annual investment.

Year 1 (build + 12 months operating)		Year 2+ (operating only)
Total cost	\$24,305 (\$9,617 initial across 2 milestones + \$1,224/mo x 12)	\$10,836 (\$903/mo)
Time savings	~\$35,000	~\$35,000
ROI on time alone	1.4x (recovers the build year)	3.2x

The drivers not counted in the table above, real, material, and where ARM's actual value lives:

- **Deal velocity.** A single closed deal at VanAllen's average commission likely exceeds the entire Year 1 cost. If ARM helps your team surface even one additional opportunity per year, a 3 AM listing change, a price drop your team would have missed, a market signal seen earlier than competitors, that is the proposal's real ROI story.
- **Error elimination.** The estimated 4 to 9% human error rate on client-facing deliverables, in a market where your clients expect zero.
- **AMSTAT API activation.** The API you have already paid for begins delivering value the day System 1 goes live.
- **Post-Essex integration acceleration.** Every advisor and client portfolio operates on one unified platform rather than the current fragmented workflow.
- **Client experience ceiling.** The foundation that makes live, branded client portals possible later (a parked capability, built when you say go).

Time savings is the floor of the ROI. Deal velocity and competitive advantage are where it actually pays.

3. What You Asked For

Captured from our May 7 conversation, your follow-up emails, and the July 21 team walkthrough. These are the objectives ARM is built to deliver:

1. **One source of truth** across AMSTAT, Aircraft Post, and VanAllen's own research: *delivered in System 1*
2. **Automated consolidation and reconciliation** of data from all three sources: *delivered in System 1*

3. **Standard reports and dashboards** generated on demand: *thirteen outputs delivered in System 1*
4. **Trend tracking** on inventory, pricing, sale velocity, days on market: *proposed evolution quarter Q3; the daily snapshots it needs start accumulating the day System 1 goes live*
5. **Proactive alerts** when significant market changes occur: *proposed evolution quarter Q1*
6. **Insights and queries in natural language**: *on the shelf, scoped and quoted when the team wants it*
7. **A documented backlog** of additional opportunities surfaced during build: *delivered for your decision, never auto-built into scope*

System 1, the subject of this proposal, is the structural foundation everything else depends on.

4. The Current State

For the record, so we are working from the same picture:

- **Two paid data services.** AMSTAT, with an API you have licensed but not yet integrated; and Aircraft Post, with API access available to subscribers, also not yet integrated.
 - **One internal researcher (Brooke)** spending 30 to 90 minutes, three to four times per day, pulling, reformatting, and reconciling data across both services into Excel workbooks for client delivery.
 - **An estimated 4 to 9% human error rate** in the resulting outputs, a figure consistent with any high-volume manual reconciliation workflow.
 - **Approximately 15,000 private jets** tracked across ~40 markets, with ~50 useful fields per aircraft.
 - **Institutional knowledge** stored across email threads, chat messages, individual advisor memory, and one-off spreadsheet notes: not searchable, not durable, not transferable.
 - **Client deliverables** built from screenshots, snapshotting a moment in time with no historical trend, no live update, no client-side interactivity.
 - **Post-Essex Aviation integration** (effective January 1, 2026): the longer the current workflow continues, the more integration debt accumulates against the combined firm.
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5. The Proposed Solution: ARM

ARM is a custom-built market intelligence platform that lives behind your single sign-on, ingests data from all three sources, applies VanAllen-defined rules to reconcile disagreements, captures your team's notes and judgment as a first-class data layer, and delivers answers, not artifacts, to your advisors.

Build philosophy: fuselage first, then one capability at a time

Think of ARM the way you would think about an aircraft. **System 1 is the fuselage**: the structural core that carries everything else. The database, the ingestion engines, the reconciliation logic, the audit layer, the security model. Built once, built right, built to carry whatever is added next.

Capabilities beyond System 1 are added one quarter at a time under the proposed evolution option (Section 7), or as individually scoped projects at the ROM ranges quoted May 20. Either way: each is its own focused build, each delivers a

visible win, each is your explicit decision before it starts, and you can stop at any point with no obligation.

Core principles

- **Your accounts, your platform, your control, from day one.** The Cloudflare account that runs ARM (application, database, and document storage) and the GitHub repository that holds the code are created under VanAllen ownership at the start of the engagement, with your designated administrator as account owner and Local Nerds operating inside them. Infrastructure charges route to Local Nerds under your platform fee, so you hold the keys and never see an infrastructure bill.
- **Your code, your data, your exit.** All source code, schema definitions, and reconciliation rules are VanAllen intellectual property from the moment of creation. Because everything already lives in your accounts, there is nothing to migrate at exit. Ever.
- **Augment, don't replace.** Brooke's expertise becomes the source-of-truth override rules. Your advisors' judgment becomes searchable institutional knowledge. The platform makes your people more powerful, not redundant.
- **One decision at a time.** No pre-commitments past the system you are buying today.
- **Built for the buyer you serve.** Your clients expect royal-family-grade output. ARM is built to that standard.

6. System 1: ARM Foundation, the All-Fleet Source of Truth

Duration: eight weeks from verified ready-to-start conditions **Year 1:** \$9,617 initial payment split across two milestones + \$1,224/month x 12 (\$24,305 total) **Year 2 onward:** \$903/month (\$10,836/year)

What we build

- **AMSTAT API integration:** automated daily sync across all 40 tracked markets (~15,000 aircraft). Architected around AMSTAT's rate limits using an incremental-sync pattern (we pull only what changed each day, then deep-fetch the changed records). From your team's perspective: data is fully fresh every morning.
- **Aircraft Post API integration:** direct, automated daily sync alongside AMSTAT. No manual exports, no uploads, no human in the loop on data flow.
- **Unified, secure database** housing all three data streams, AMSTAT, Aircraft Post, and VanAllen internal research as its own source with manual override, with full historical retention from day one. Per-aircraft document storage, per-record comments with attribution, and imagery where the source feeds carry it, as covered in the July 21 walkthrough.
- **Field-by-field reconciliation engine**, configured to VanAllen's rules. A half-day workshop with Brooke in Week 1 establishes the rules that govern how disagreements resolve. Up to 30 rules in the workshop, comfortably more than a fleet this size typically needs; more join over time as minor enhancements under the monthly fee.
- **Web interface via Microsoft 365 single sign-on.** Unlimited VanAllen users, no per-seat fees. Three roles at launch: Admin (user management and configuration), Analyst (resolve conflicts, override with recorded reason codes), Advisor (search, view, run reports, save watchlists). Watchlists work per-user and company-wide.
- **Complete audit trail:** every read of aircraft records and every write to any field is logged with user, timestamp, and change detail. Logs retained 7 years.

Thirteen Day 1 outputs

Seven real-time dashboards: Today's Activity; This Week's Activity; Market Pulse (all 40 markets on one screen); Reconciliation Queue; Watchlist / Saved Searches (per-user and company); Pricing Intelligence (ask vs. source-reported

estimated value vs. last paid, price distribution); Fleet Composition and Equipage.

Six report templates (configurable parameters, PDF + CSV export): Aircraft Detail (including photos where the source feeds carry them); Market Snapshot; All-Markets Inventory Summary; Watchlist Report; Reconciliation Status; Comparable Sales.

The Pricing Intelligence and Fleet Composition dashboards and the Comparable Sales report are the pieces your team saw in the July 21 walkthrough, now included in the base at no change to the Year 1 price. Templates beyond these are scoped and quoted individually before any work starts, typically \$1,500 to \$2,500.

Support and SLA

Support is built into the platform: every screen carries a support button that opens a ticket form, plus a dedicated support address. Submit a ticket, you receive an email confirming it is logged, and then we take care of it. Every ticket is assigned a severity:

Severity	Definition	Acknowledgment	Resolution standard
1	Platform down, a data pipeline failure, anything security	Within 4 business hours	Top priority until resolved
2	Broken, but a workaround exists	Within 1 business day	Fix targeted within 3 business days
3	Cosmetic, formatting, how-to, small tweaks	Within 2 business days	Batched into the monthly enhancement window

Business hours are 8 to 6 Mountain, Monday through Friday, U.S. federal holidays excepted. Every ticket is logged, and the log is summarized in your quarterly usage and ROI report. Bug fixes are on us, no invoice.

When a source changes its API: this is exactly what the monthly platform fee exists for. Each feed connects through its own adapter layer, so a source change hits the adapter, not your database. Every overnight sync runs contract checks against what the API is supposed to send, so drift is caught by an alarm, not by your team finding strange data. Field-level changes are fixed under the fee at Severity 2. A wholesale API replacement by a vendor is scoped as its own small project, and if a source ever disappears entirely, we integrate its replacement the same way.

Training

Included: a live training session for the whole team at launch, recorded for anyone who joins later; a written quick-reference guide; the Week 1 rules workshop and a launch-week working session with Brooke; and open office hours for the first 30 days after go-live.

The eight weeks: what we need, and what you'll hear from us

From VanAllen: signed agreement and the first milestone payment of \$4,809 (which kicks off ready-to-start verification); named owners (executive sponsor, workflow and rules, IT and identity, contracts and accounts); AMSTAT and Aircraft Post API credentials and documentation; Microsoft 365 access to configure single sign-on; Brooke's half-day rules workshop in Week 1; and two-business-day turnarounds on items sent for review (the eight-week promise assumes this; slower reviews shift delivery day for day).

From Local Nerds: a written status every Friday (shipped, next, blocked, decisions needed); a weekly 30-minute working check-in; executive checkpoints at week 4 and week 8; and any blocking issue flagged within 24 hours, never saved for Friday.

System 1 success criteria

- All ~15,000 aircraft across all 40 tracked markets fully ingested and synced daily
- Brooke's manual reconciliation workflow eliminated entirely, both data sources syncing automatically end to end
- Any field-level disagreement between AMSTAT and Aircraft Post visible, attributed, and resolvable in-app
- Any team member can pull a complete, current view of any aircraft in seconds
- All thirteen Day 1 outputs live and in use
- The AMSTAT API delivering value as a live, queryable asset for the first time since you licensed it

7. After Year 1: The Operating Choice (Proposed)

Two legitimate paths, both built from numbers you already have. Neither is a commitment today.

Option 1: Steady-state operation, \$903/month (quoted May 20)

Operate System 1 as built, for as long as you run the platform. Covers all infrastructure, schema-drift monitoring, minor enhancements (~4 hours/month), quarterly reconciliation-rule reviews, the SLA above, and a quarterly usage and ROI report. No new capabilities. The conservative floor, exactly as quoted.

Option 2: Continuous Evolution Retainer, \$3,800/month, proposed, one quarter at a time

Everything in steady-state, plus one major capability per quarter and 10 hours/month of fractional data ops (adoption support, data integrity reviews, and a quarterly strategic working session). Committed one quarter at a time, with 30-day notice before any next quarter. \$3,800 replaces the \$903 during building quarters; the two never stack. Never auto-renewed at the buildout rate.

The proposed four-quarter roadmap, sequenced to what your team asked for on July 21:

Quarter	Capability
Q1 (Months 13-15)	Custom Alerts + Microsoft Teams integration: 3 AM listing alerts to advisors, Teams bot for queries from anywhere
Q2 (Months 16-18)	AI-Generated Market Summaries: on-demand, publishable summaries from reconciled data
Q3 (Months 19-21)	Historical Trend Tracking: pricing, inventory, sale velocity, days-on-market over time, built on snapshots banked since go-live
Q4 (Months 22-24)	Estimated Value Engine + Data Enrichment: an internal valuation model informed by VREF, FAA registry ingestion, and your own sale history, tracking its estimate against every closed sale and tightening recursively

Parked, when you say go: Client-Facing Live Portals (parked by your team on July 21 until the data and workflows are mature) and Natural-Language Query. Any scheduled or parked item can also be pulled forward as an individually quoted project at the May 20 ranges.

When you stop building, the fee steps down. At every quarter boundary, you either continue at \$3,800 or settle into steady-state at \$903 plus the published operating fee of each capability you kept. Three of the four roadmap capabilities carry the exact operating fees quoted May 20 (Alerts +\$75 to \$200/mo, Teams +\$0, AI Summaries +\$150 to \$400/mo, Trends +\$100 to \$250/mo); the Value Engine is new, so its fee is fixed in writing at its scope lock, before you commit to that quarter. Stop after

Q1 and you operate near \$1,000/month. Keep all four and steady-state lands between \$1,228 and \$1,753/month from the May 20 ranges, plus the Value Engine fee. Never auto-stepped up, and the default on no decision is steady-state.

Your \$100K question, answered in structure. On May 18 you flagged the risk of signing up for System 1 at \$24,000 and then drifting toward \$100,000 for the remaining needs. The May 20 reply answered with ROM ranges: roughly \$60K to \$85K all-in over 24 months if every bolt-on were individually scoped. The proposed evolution path lands at **\$69,905 all-in over the same 24 months** (\$24,305 + \$3,800 x 12), inside that range, with the budget fixed in advance and the commitment held to one quarter at a time.

8. Investment Summary

System 1, Year 1

Payment	Amount	When due
Initial, 1 of 2	\$4,809	At contract signing (kicks off the build)
Initial, 2 of 2	\$4,808	At System 1 launch (delivery milestone)
Monthly platform fee	\$1,224/month x 12	First payment 30 days after launch
Year 1 total	\$24,305	

The initial payment is split across two milestones: half at signing, half at launch. You only pay the back half when the system is actually live. The monthly platform fee begins at launch, not at signing.

System 1, Year 2 onward

	Amount
Monthly platform fee	\$903/month
Initial payment	None. The build is paid off
Year 2 total	\$10,836

Alternative billing

If you would prefer to settle Year 1 in one transaction: **annual upfront with 4% discount, \$23,333** paid at contract signing, no further Year 1 invoicing. Year 2 returns to \$903/month.

What the monthly fee covers

All platform infrastructure (application, database, storage, monitoring, security, and AI usage up to a generous ceiling of \$150/month of raw model cost, several times what System 1 is projected to use; if adoption ever outgrows it, you see the usage report first and anything above passes through at our cost, no markup). Schema-drift watching. Approximately 4 hours/month of minor enhancements. Quarterly reconciliation-rule reviews. The SLA. A quarterly usage and ROI report.

The proposed 24-month all-in

Phase	Window	Amount
System 1, Year 1	Months 1-12	\$24,305
Proposed evolution, 4 quarters	Months 13-24	\$45,600 (\$3,800 x 12)
All-in through Month 24, if every quarter is taken		\$69,905

Every quarter is your explicit decision. Take none of them and Year 2 is \$10,836 at steady-state.

9. Third-Party Costs

The only third-party costs on VanAllen's side are subscriptions you already have.

What you already pay for	How ARM uses it
AMSTAT subscription	ARM uses the API you have already licensed
Aircraft Post subscription	ARM uses the API available to your subscription tier
Microsoft 365	ARM uses M365 for single sign-on
Your existing domain	ARM lives on a subdomain, e.g. arm.vanallen.com. No new domain purchase

Everything else is on us. Local Nerds operates and pays for the underlying infrastructure inside your Cloudflare account. You pay one fee, see one bill, and never get a surprise invoice when usage scales.

10. What This Replaces, and What It Doesn't

ARM replaces: manual cross-referencing between AMSTAT and Aircraft Post; spreadsheet-based snapshot reports; screenshot-driven client deliverables (fully, as later capabilities land); email-trapped institutional knowledge.

ARM does not replace: your AMSTAT subscription (it is the data source); your Aircraft Post subscription (same); your CRM or contact systems; your team's judgment. ARM operationalizes that judgment, never replaces it.

11. Why Local Nerds

The fair question for a sophisticated buyer: why not hire a developer directly at half the price?

Because a developer builds what you spec. What VanAllen needs is someone who can sit with you and Brooke, derive the reconciliation rules from how you actually think about aircraft, encode your team's judgment into the system, and translate operational reality into working software. That is closer to fractional CTO than contract development. The technical build is the smaller half of the problem.

The relevant track record:

- 25+ years in marketing and operations leadership, including selling a marketing firm and serving as fractional CMO across 8 operating companies in a private-equity portfolio. The deliverable across all 8 companies was the same: repeatable systems producing senior-grade output without my hands on every job.
- Local Nerds builds AI implementation systems specifically for service businesses and advisory firms, the same operating model VanAllen runs.
- Direct principal involvement on every engagement, now with dedicated implementation support (you met Noah on July 21). You are not handed to a junior team.
- Stack discipline: Cloudflare end to end (application, database, storage, security), with Anthropic Claude for intelligence. One vendor surface, standardized, secure, well-documented.
- Built for the buyer you serve. Your clients expect royal-family-grade output. ARM is built to that standard.

12. Data Security and Compliance

For a firm with VanAllen's client base, this deserves its own section.

- **Single-tenant infrastructure.** VanAllen's data lives in a dedicated Cloudflare database scoped to VanAllen alone, on US-based infrastructure, inside the Cloudflare account VanAllen owns. No multi-tenancy, no shared schema.
- **Encryption.** AES-256 at rest, TLS 1.3 in transit, end to end on every connection.
- **Access controls.** User access scoped to role (Admin, Analyst, Advisor). Contact PII visibility configurable per user.
- **Audit logging.** Every read of aircraft records and every write to any record is logged with user, timestamp, and change detail. Logs retained 7 years.
- **AI training opt-out.** Zero data retention on the Claude API path is available on request. Your data is never used to train Anthropic's or any other vendor's models.
- **Underlying compliance.** Cloudflare and Anthropic are SOC 2 Type II certified. Documentation available on request.
- **Annual third-party penetration test** included in the annual contract.
- **NDA executes before any credentials, data samples, or client information moves.** Standard mutual NDA, or we sign your form, your preference.
- **Data portability.** All data exportable to VanAllen's custody at any time, in standard formats (CSV, JSON, Parquet). And because the accounts are yours from day one, portability is a property of the architecture, not a promise.

If your team or your clients require additional documentation, SIG questionnaires, vendor security reviews, or a custom DPA, that is available and standard scope.

13. Risks and Honest Assumptions

In the spirit of a relationship on solid ground:

- **AMSTAT API rate limits (25 requests per minute).** System 1 uses an incremental-sync architecture that fits comfortably inside the rate limit with headroom for ad-hoc queries. The initial bulk load runs over 1 to 2 days, once.

- **Aircraft Post API scope.** We confirm field-by-field coverage against your current Excel export in Week 1. Any field you rely on that the API does not surface is captured via a small supplementary process and documented explicitly.
- **Reconciliation rules require your input.** The half-day workshop with Brooke in Week 1 establishes them. If rule definition needs more time, the timeline extends and the price stays fixed.
- **Timeline risk-share.** If we cause a delay, you do not pay for our overrun. If rule definition or review windows extend the build, the timeline moves and the price stays fixed.
- **Estimated values, honestly.** Day 1 dashboards show source-reported estimated values, which your team rightly distrusts. The internal Value Engine that replaces them is the proposed Q4 capability, priced at its scope lock, and its estimates improve recursively against your own closed sales. We will not pretend precision before the data earns it.
- **Brooke's role evolves.** Her domain expertise becomes more valuable, not less. The override rules, the knowledge layer, the quality assurance: her territory. The platform makes her senior, not redundant.

14. What I Need From You

1. **Signed agreement** (the mutual NDA arrives first, then the signature copy)
2. **First milestone payment of \$4,809** (kicks off ready-to-start verification)
3. **Named owners:** executive sponsor, workflow and rules, IT and identity, contracts and accounts
4. **AMSTAT API credentials and Aircraft Post account access** (inside the NDA-protected channel)
5. **Microsoft 365 access** to configure single sign-on
6. **Brooke's half-day rules workshop** scheduled in Week 1

15. Indicative Timeline

Milestone	Approximate date
NDA executed + agreement signed	Within 1 to 2 weeks
Kickoff + rules workshop	Within 10 business days of signature
System 1 build window	Eight weeks from verified ready-to-start
System 1 live	Roughly nine to ten weeks after signature
First quarterly conversation about what comes next	At the Year 1 mark

Dates are indicative and depend on the ready-to-start conditions in Section 14.

16. Next Step

Proposal valid through August 20, 2026.

The mutual NDA and kickoff scheduling link are on their way to you and Caycee, with the signature agreement right behind them. Sign, send the first milestone, and we verify ready-to-start together; the eight-week clock runs from there.

If anything needs adjusting, scope, sequencing, structure, or success criteria, a 30-minute call gets us aligned this week. The proposal serves the project, not the other way around.

Thank you for the opportunity. This is the work I built Local Nerds to do, and VanAllen is exactly the kind of firm I want as a long-term partner.

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