



Primary Record

THE MEDICAL HOMEBASE FOR FAMILIES

Families facing a life-changing diagnosis

must collect, organize, and prepare to share health information and decisions to a growing care team.



Cancer



Dementia



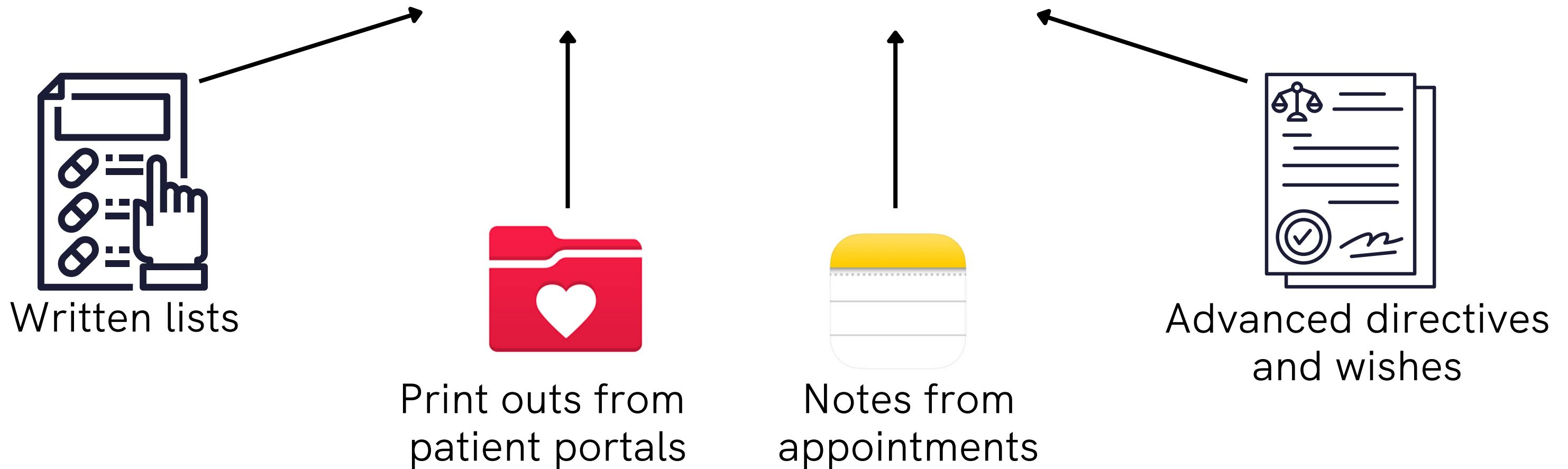
Genetic Disorders

Examples

Current option for families



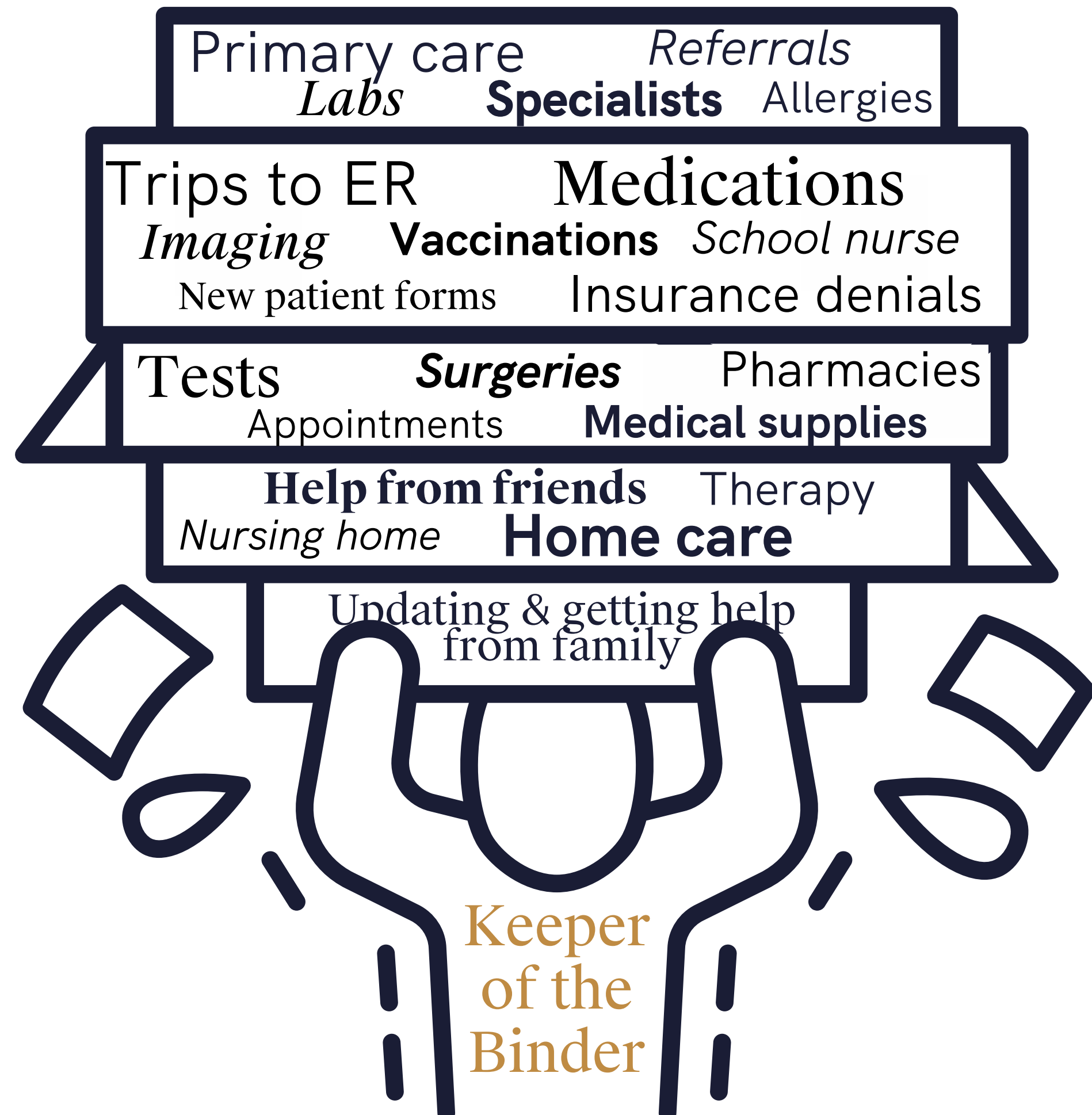
Binders & file folders



This is **overwhelming.**

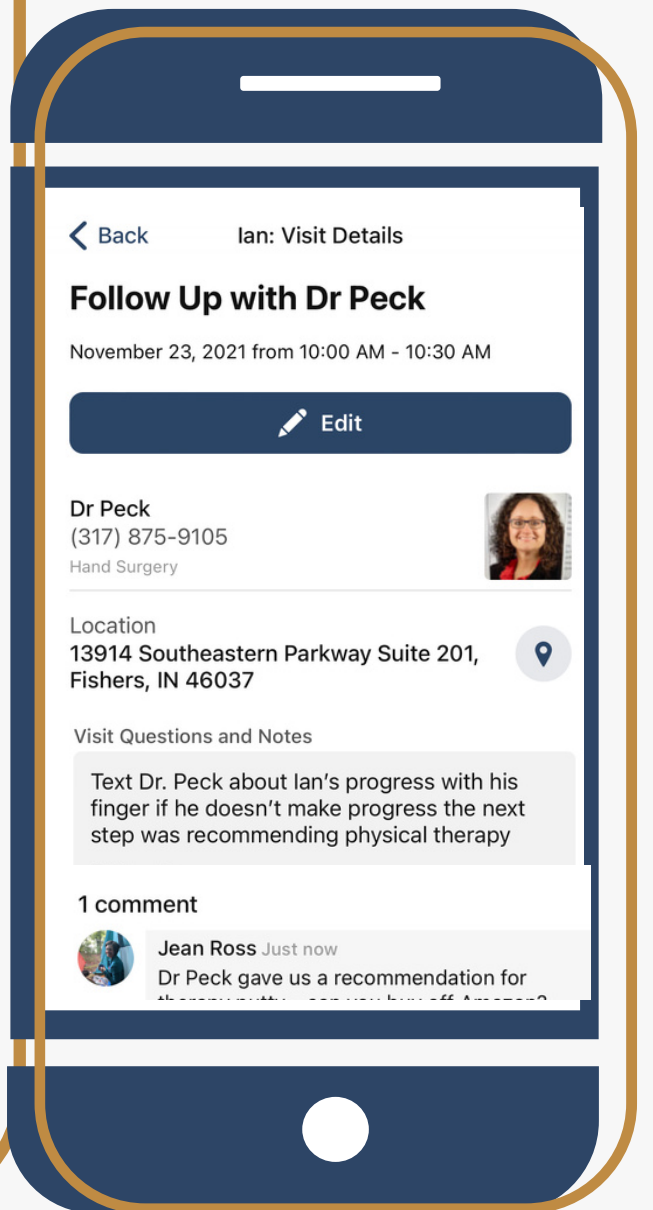
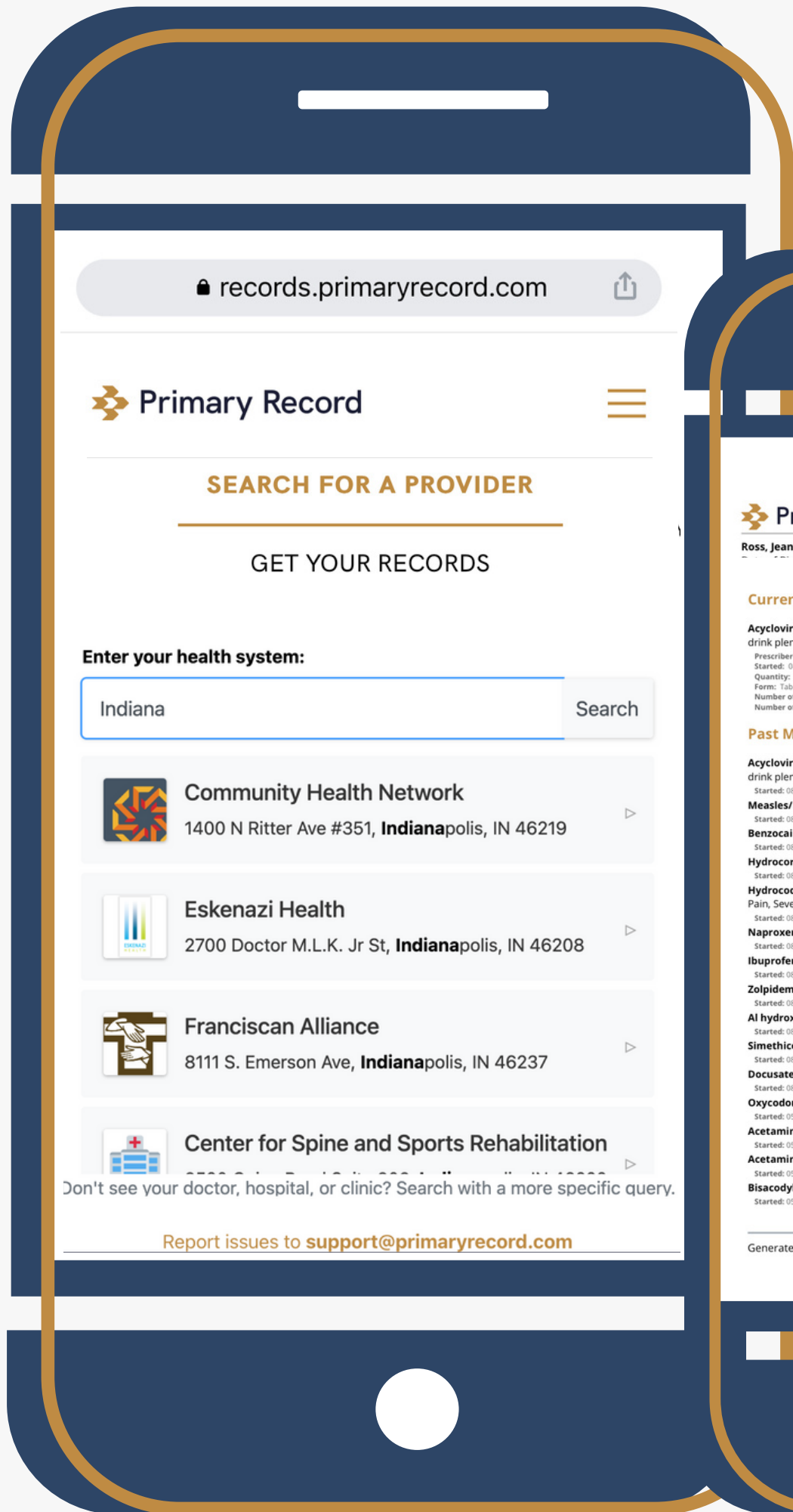
"...every family is literally creating an entire delivery system, all by themselves, over and over again."

Landscape of Caregiving Innovations (2021)



The Solution: Primary Record

A medical homebase for families to organize health data in one place and share over a lifetime.



Families are about to manage even **more...**

DEADLINE FOR CERTIFIED HEALTH IT VENDORS

DECEMBER 31, 2022

PATIENTS & CAREGIVERS CAN DOWNLOAD
HEALTH DATA INTO THE APP OF THEIR CHOICE

The 21st Century Cures Act changed how health data will be shared.

Competitive Landscape



Collecting Health Data

Family-Focused

Competitive Matrix



Binder

MyChart App

myFHR

Connects to Patient Portals



Edit Records & Take Notes



Family Control of Access & Sharing



Messaging & Coordination



Subscription-based Premium Features

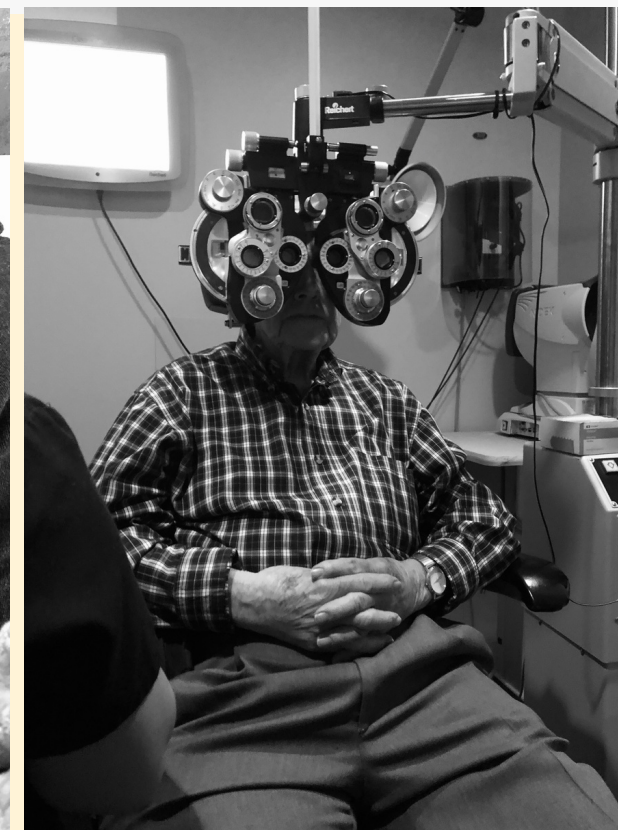


Jean Knows the Value from **Prior Experience**

Jean
Ross,
RN

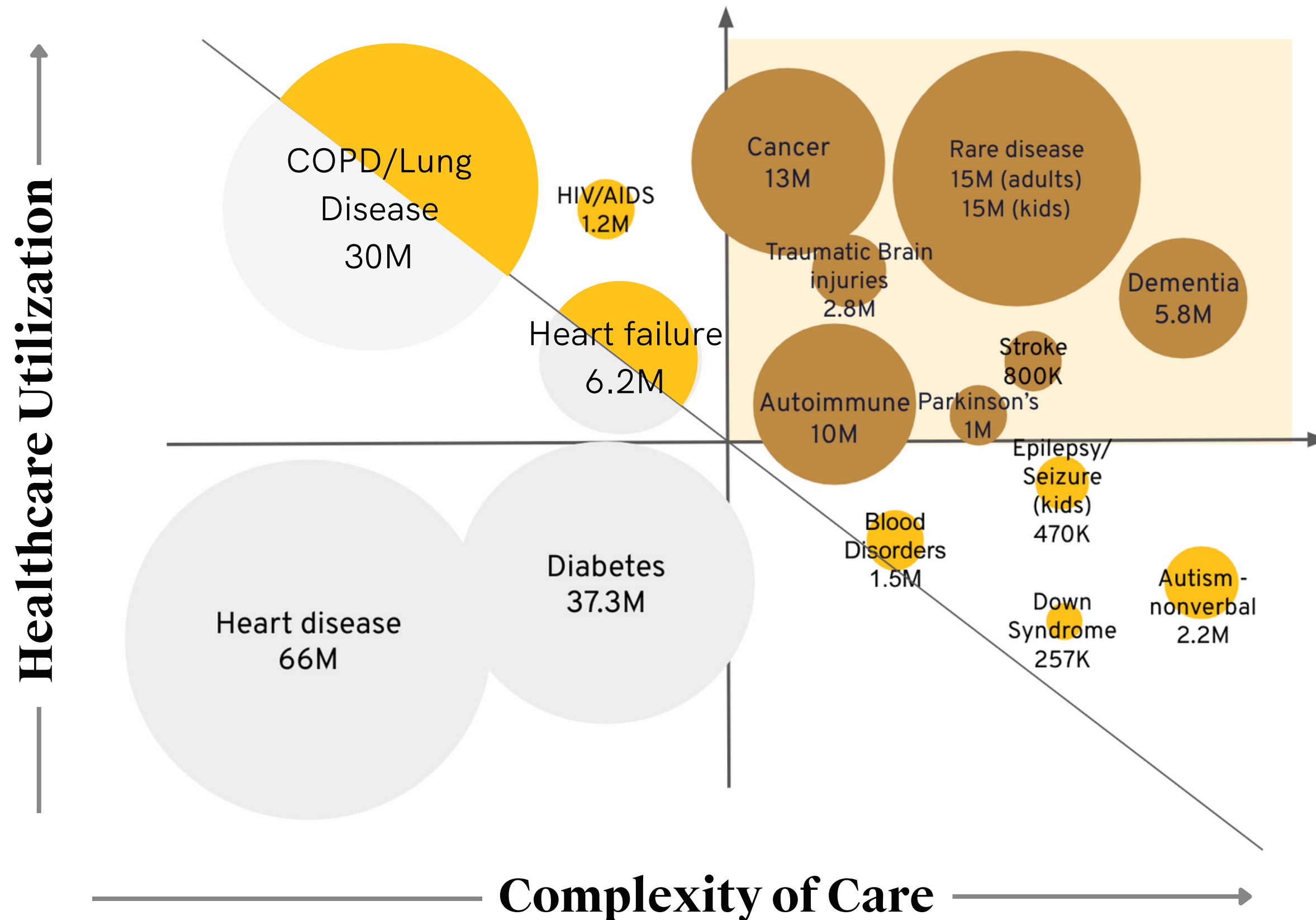


Kay 
Jean founded
KayBee.Us in 2015 to
coordinate health
services for aging adults.



There are **4,000** professionals like Jean serving **160,000** clients per year. Charging **\$75-\$150/hour**, each work with **five** family, friends, & other professionals. - [Aging Life Care Association](#)

Understanding the Market for **Who Begins a Binder**



Over the next 40 years, the number of adults 65+ will double.

Market Sizing

TAM

Total Addressable Market

Less complex less frequent use of the healthcare system

208.5 Million

SAM

Serviceable Available Market

Either complex or frequent use of healthcare

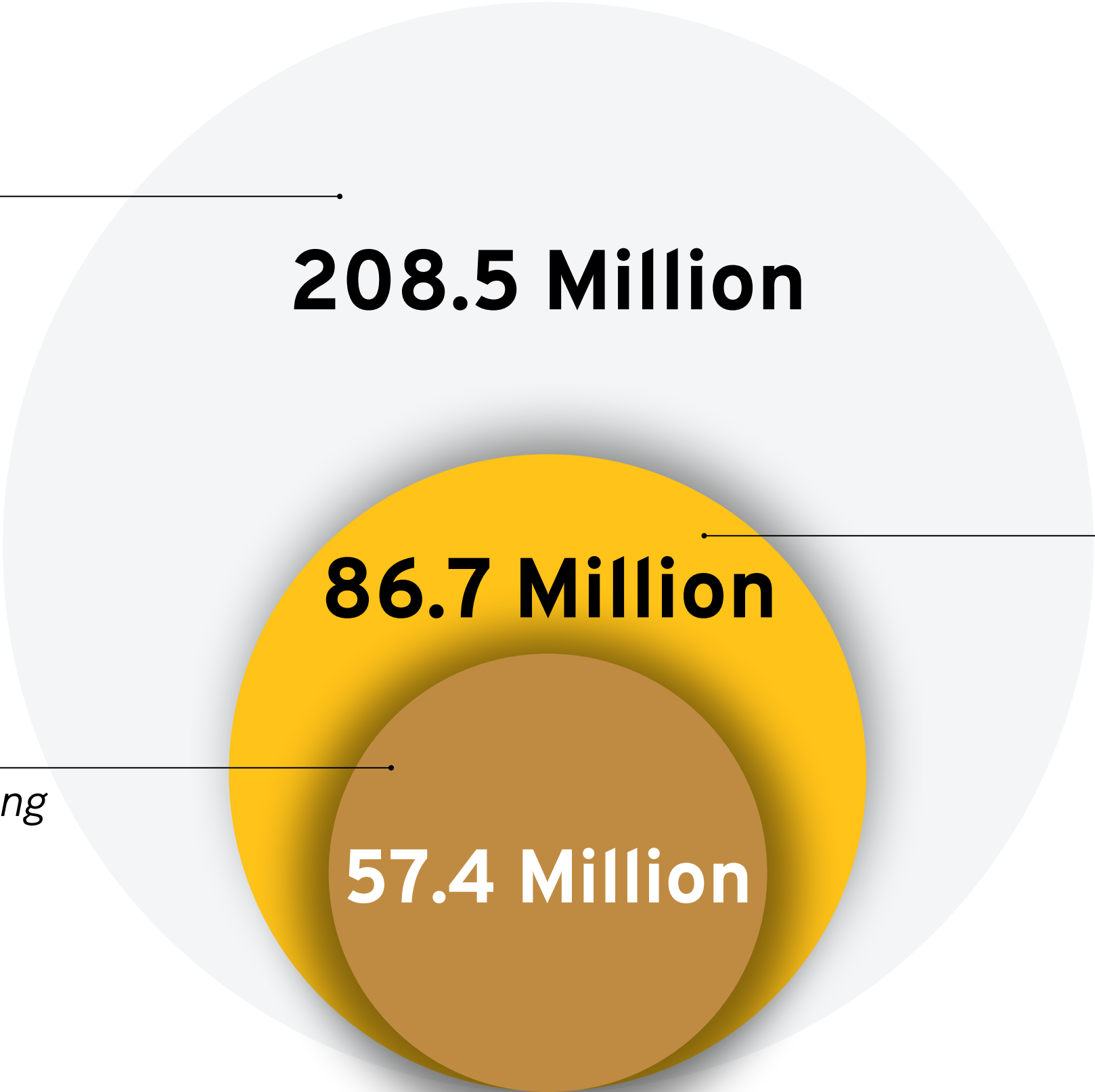
86.7 Million

SOM

Serviceable Obtainable Market

Complex care teams interacting with healthcare often

57.4 Million



Business Strategy

Phase 1

Serve families & community

Self-service products with low customer acquisition costs serving families first:

- Website medical records requests
- Mobile application subscription with a free tier

Average Monthly Revenue Per User = \$5
Market Size 57.4M

Phase 2

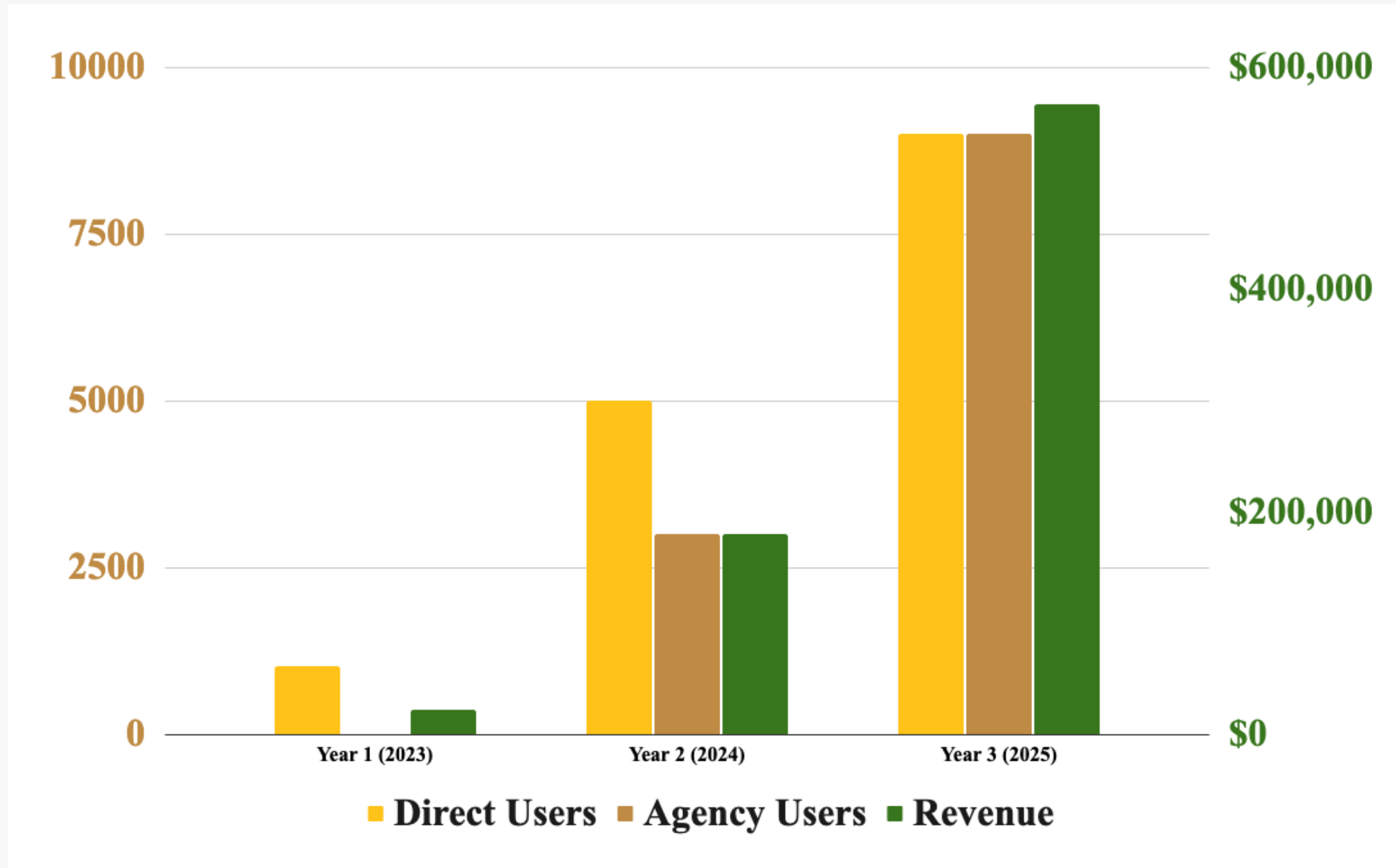
Scale with B2B & Marketplace

Adding engineering, marketing, and outbound sales to serve the business market:

- Application subscription for agencies
- Agency marketplace with community sponsorship

Average Yearly Revenue Per User = \$5,000
Market Size 500k agencies

Estimated User and Revenue Growth



Model Assumptions

- 25% User growth
- 20% Paid Subscribers
- \$85 Per Subscriber per year
- 80% Margin
- 10% Churn

Plan

- Establish application with (\$15k) Op Loss
- User growth from agency customers introduced in year 2

21st Century Cures Act & Product Timeline

EHI = Electronic Health Information



Current Traction

111

WAITLIST SIGNUPS

209

**PARTNERS READY TO SHARE
WITH FAMILIES**

3

(Creating a pipeline of 10K users)
**AGENCIES INTERESTED IN
BETA 2023**

As of November 22, 2022

Free Onsite Experience



[About](#) [Contact](#) [Blog](#)

[Join the Mobile App Waitlist](#)

See how Primary Record helps families access health information.

Securely connecting to a patient portal via 1UpHealth, Primary Record retrieves current and historical health data then downloads into an easy to read PDF to share. Try out the experience.

Benefits

- See additional health information not always shown in a patient portal.
- Add multiple patient portals to make one health summary.
- Use to help understand a family member's health history.

Provide your name and email to start

Name

Email

Submit



<https://records.primaryrecord.com>

What sets Primary Record apart?



Jean Ross, Full-time Nurse Co-founder

- Recognized speaker & volunteer in aging, caregiving, & dementia
- Founded & built a local network of aging services and coordination



Jim McIntosh, Full-time Technical Co-founder

- 25+ years in product management and technology
- Primary caregiver for a medically complex child and aging mother



Dr. Christian Ross, Physician Advisor

- Practicing board-certified emergency physician (11+ years)
- Interacts with the gaps in healthcare information exchanges daily

Seeking Partners & Experts to Launch, Grow, and Continue Development

2020-2022 Financial Recap

- Co-founder investment to date - \$198K
- Small Business Grant - \$10K
- Earmarking \$30K to complete MVP App
- Minimize Operating Costs to - \$1K/Mo.

2023-2024 Future Use of Funds

- Product Expansion
- Customer Success
- Marketing & Events
- Agency Product Development

Exit Strategy: Acquisition

Healthcare Data Brokers

1uphealth

HUMAN API

Insurance Companies

Anthem

UnitedHealthcare

Consumer Health Apps

careevolution
HEALTHCARE TECHNOLOGY

CircleOf

b.well

2nd Tier EHR Vendors

ORACLE

Allscripts
All possible

National Public Agencies

USAging



Primary Record

THE MEDICAL HOMEBASE FOR FAMILIES

**We cannot wait to share
our story with you.**

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<https://www.primaryrecord.com/>

