

# Primary Record

## Executive Summary



### MISSION

Simplify health information for families.

### VISION

To create a universal health information source that empowers individuals, families, and healthcare providers with accessible, accurate, and secure health data.

### The Product

A subscription-based mobile application for families to securely integrate health information from patient portals for each family member and store notes and health documents in a central place. With Primary Record, a family controls sharing view or edit access so their support or care team can search and help maintain health history from multiple providers and hospital systems.

### The Founding Team

Jean is a nurse who founded and ran a care coordination business tailored to seniors facing life-altering diagnoses. Jim is a 25-year+ product manager who has led big data ideas to \$10M ARR. He also cares for his medically complex daughter Mia. Our physician advisor, Dr. Christian Ross, an emergency physician, has experience working with health information exchanges and sees the gaps in health data daily in caring for patients in crisis.

### The Market

While the team believes that most families would benefit from Primary Record, we have focused on a market segment of 66.7 million highly complex, high utilizers of health care who would engage the most. Many of these patients and their caregivers currently use three-ring binders as a solution. No mobile application fills their needs presently.

### Competitive Advantage

Our team is the difference maker. Jim has the tech know-how, Jean has the connections to distribute, and Chris has the contacts in the healthcare world. Most importantly, every team member lives the problem and is deep-rooted in communities asking for a solution.

### Finances & Ask

The co-founders have bootstrapped \$260K to release an MVP in Google and Apple stores. As we advance, we are raising \$500K to scale and grow the product over the next 18 months. This will help fill out our development team with a full-time hire, reach more customers, bring us to profitability, and round out product-market fit.

### Future Plans

After completing our first 18-month push, we plan to expand our team and build the product to further market growth. Our 3-year conservative goal of 9K subscribers brings us to an ARR of \$2.3M.