

SYSTEMM

The protocol, the people, the place.

A members-only longevity, performance, and recovery brand — clinical care, private training, and a digital tier in one membership.

— THE PRODUCT · THREE ROOMS, ONE MEMBERSHIP

<p>CLINICAL</p> <p>Bloodwork, peptide protocols, physician care, IV therapy.</p>	<p>TRAINING</p> <p>Coaching, Z2, strength, power, eccentric programming.</p>	<p>RECOVERY</p> <p>Sauna, plunge, sleep, mobility — same floor as gym.</p>
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— THE FOOTPRINT · TWO METROS, THREE FLAGSHIPS

<p>01 · Month 1</p> <p>NYC MIDTOWN</p>	<p>02 · Y2</p> <p>MIAMI / PALM BEACH</p>	<p>03 · Y3, from cash flow</p> <p>NYC #2</p>
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— WHY THE GYM IS THE ANSWER

Take the gym out and we are a peptide telehealth play.
Leave it in and we are a *lifestyle brand at scale.*

<p>FINANCIAL</p> <p>7x ARPU</p> <p><i>\$600 peptide-only → \$4,400 full SYSTEMM</i></p>	<p>STRUCTURAL</p> <p>Cash entity</p> <p><i>Gym is wholly owned; PC is physician-owned</i></p>	<p>STRATEGIC</p> <p>Moat</p> <p><i>NYC + Miami footprint can't be cloned in software</i></p>	<p>DIGITAL</p> <p>\$3M ARR</p> <p><i>\$50/mo tier at 5,000 members, 92% margin</i></p>
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— BUILT, SHIPPED, LIVE

Mobile app · clinician dashboard · protocol builder · body-comp projector · welcome case.

Three working live demos available. Full 19-slide deck on request.

The Row × Whoop × Equinox, for the people who run the world.

— Y3 EXIT RUN-RATE

\$31.2M · \$14.2M

Revenue · EBITDA · 46% margin · physical + digital combined

— P&L SUMMARY

(\$k)	Y1	Y2	Y3	EXIT
Members EOP — physical	100	250	500	500
Members EOP — digital	1,000	3,000	6,000	6,000
Total revenue	3,749	11,394	24,188	31,196
Gross profit	2,683	8,076	17,072	21,918
OpEx	(2,466)	(3,976)	(6,461)	(7,672)
EBITDA	217	4,100	10,610	14,245
EBITDA margin	5.8%	36.0%	43.9%	45.7%

— UNIT ECONOMICS · PER MEMBER

<p>ARPU / mo</p> <p>\$4,400</p>	<p>Contribution margin</p> <p>66%</p>	<p>LTV (3-yr cap)</p> <p>\$106k</p>
<p>CAC</p> <p>\$1,000</p>	<p>Payback</p> <p><1 mo</p>	<p>Annual churn</p> <p>15%</p>

— THE ASK

\$3.7M

Seed round · closing target Q3 2026.

<p>NYC MIDTOWN</p> <p>\$1.7M</p> <p>Clinic + gym + tech + brand</p>	<p>MIAMI / PALM BEACH</p> <p>\$1.4M</p> <p>Y2 expansion buildout</p>	<p>RESERVE + BUFFER</p> <p>\$0.6M</p> <p>6-month runway + 15% contingency</p>
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CAPITAL EFFICIENCY

NYC #2 in Y3 funded from operating cash flow. Digital tier needs no incremental capital.