

# ROOK

## INVESTOR DECK



2025

# PROBLEM



**"Having to integrate wearables one by one, maintaining those integrations, and processing the information to actually be able to make sense of it is a huge pain."**


**+80 more**

# SOLUTION

**ROOK enables health, insurance & wellness companies to access and make sense of their users' wearable data.**

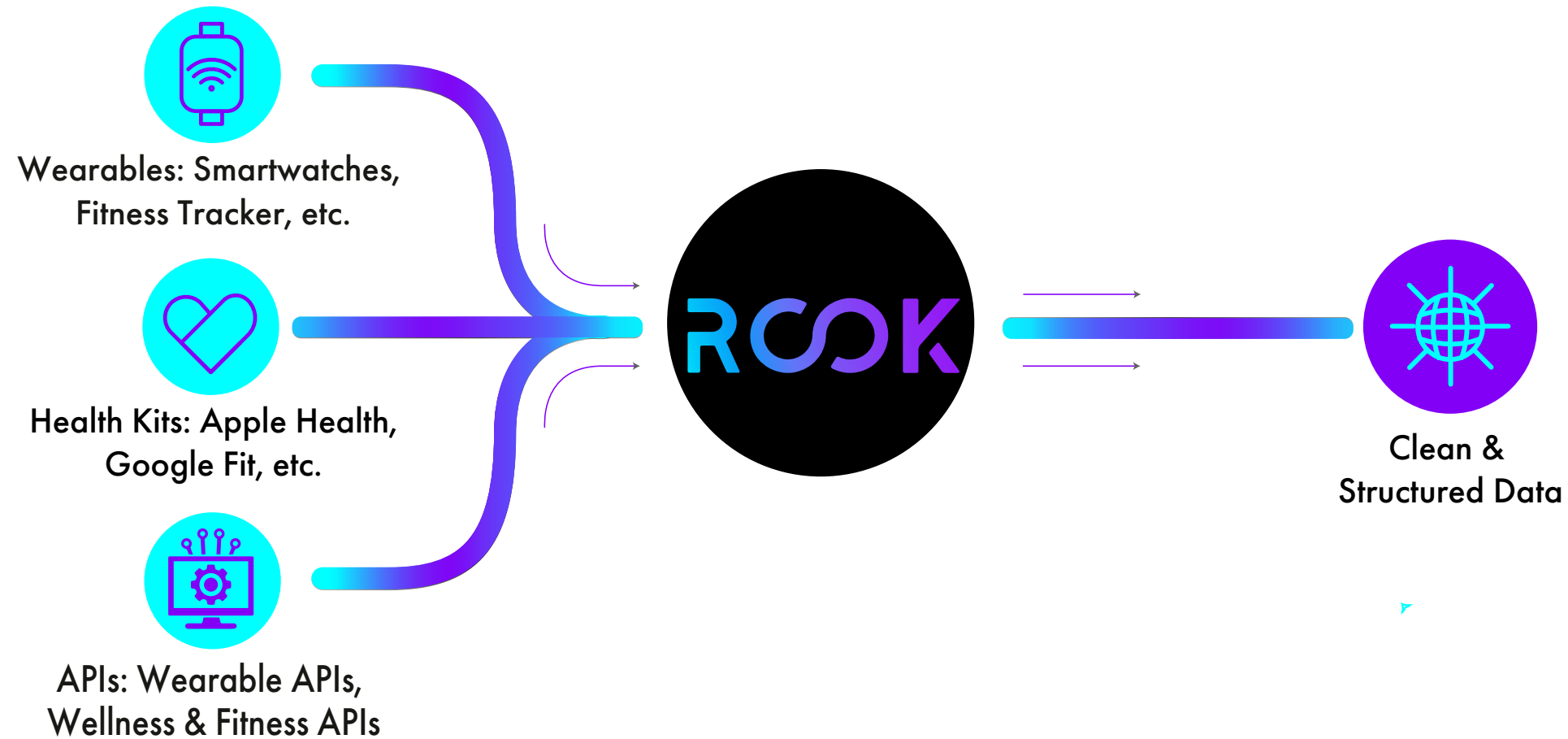
via simple API/SDK integration into their apps (B2B Business Model)



























Building the Stripe/Plaid for Wearable Health Data

# B2B - BUSINESS MODEL: HEALTH-DATA-AS-A-SERVICE

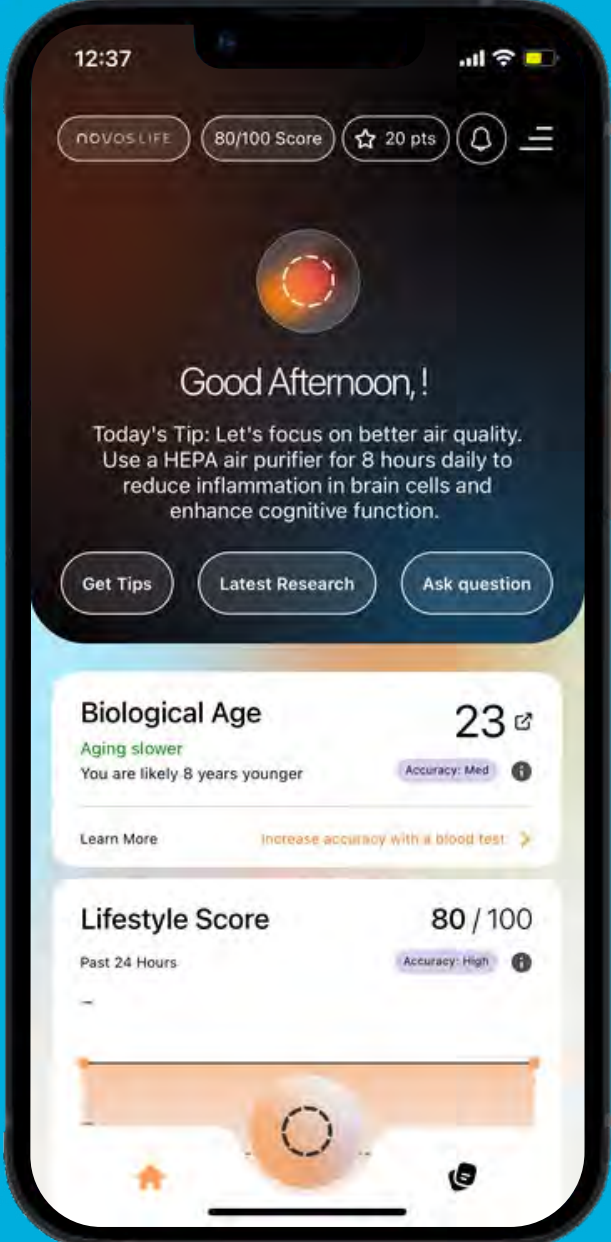
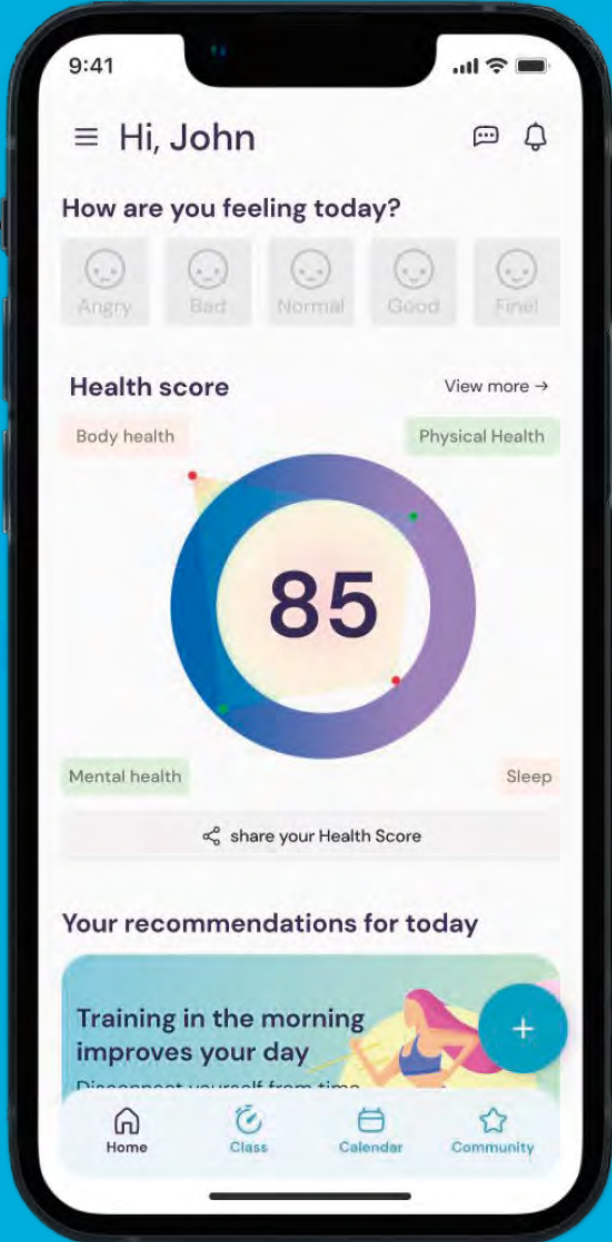
Provided via API and charged per Active User



# TARGET MARKET

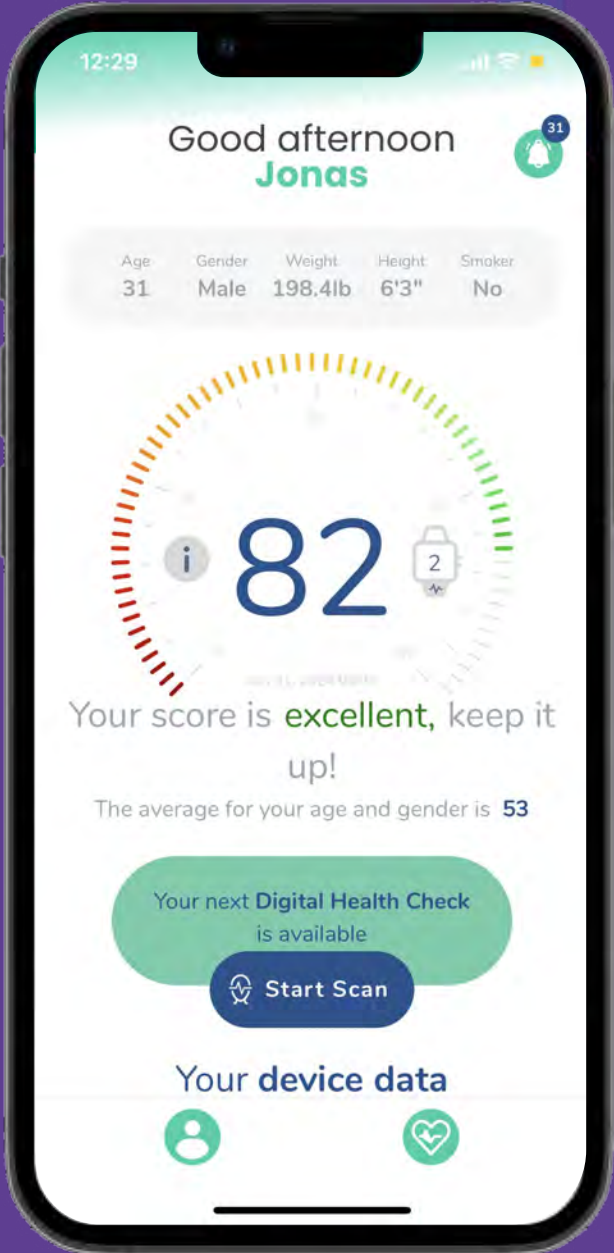
Vertical	Size	Niches	Reference Accounts	Go-to-market channels:	ROOK Use case	Timeline
<b>Fitness &amp; Wellness</b>	\$1.5B USD	<ul style="list-style-type: none"> <li>Club Management Software</li> <li>Fitness Apps,</li> <li>Wellness Apps</li> </ul>	   	<ul style="list-style-type: none"> <li>Channel Partnerships: Product Dev. Agencies ( ,  )</li> <li>Inbound Mkt (  )</li> <li>Event &amp; Networking ( ,  )</li> </ul>	<ul style="list-style-type: none"> <li>Holistic health approach</li> <li>Longevity focus</li> <li>Upsell and/or retention via personalization</li> </ul>	<ul style="list-style-type: none"> <li>Short term focus</li> </ul>
<b>Insurtech</b>	\$4B USD	<ul style="list-style-type: none"> <li>Insurance Tech Providers</li> <li>Health Insurance</li> <li>Life Insurance</li> </ul>	    	<ul style="list-style-type: none"> <li>Event &amp; Networking ( ,  )</li> <li>PR (Paid/Organic)</li> <li>Automated outbound (Linkedin/Email)</li> <li>Channel Partnerships and Ambassador Work: </li> </ul>	<ul style="list-style-type: none"> <li>Data is a key driver to risk evaluation and prevention</li> <li>Duplicity handling and reliability of data</li> <li>Depth of processing and support of target metrics</li> </ul>	<ul style="list-style-type: none"> <li>Mid-term focus</li> </ul>
<b>Digital Health</b>	\$3.5B USD	<ul style="list-style-type: none"> <li>Chronic Disease Management</li> <li>Telehealth</li> <li>Remote Patient Monitoring</li> </ul>	  	<ul style="list-style-type: none"> <li>Channel Partnerships: (Health-tech) Product Dev. Agencies and Data Interoperability Player ( ,  )</li> <li>PR (paid/organic):  / </li> <li>Automated outbound (Linkedin/Email)</li> </ul>	<ul style="list-style-type: none"> <li>Data is a key driver to personalized care</li> <li>Reliable delivery and structure</li> <li>Rigorous security and compliance standards</li> <li>Rapid extraction, processing, and delivery</li> </ul>	<ul style="list-style-type: none"> <li>Long-term focus</li> </ul>

# EXPERIENCES CREATED WITH OUR TECHNOLOGY



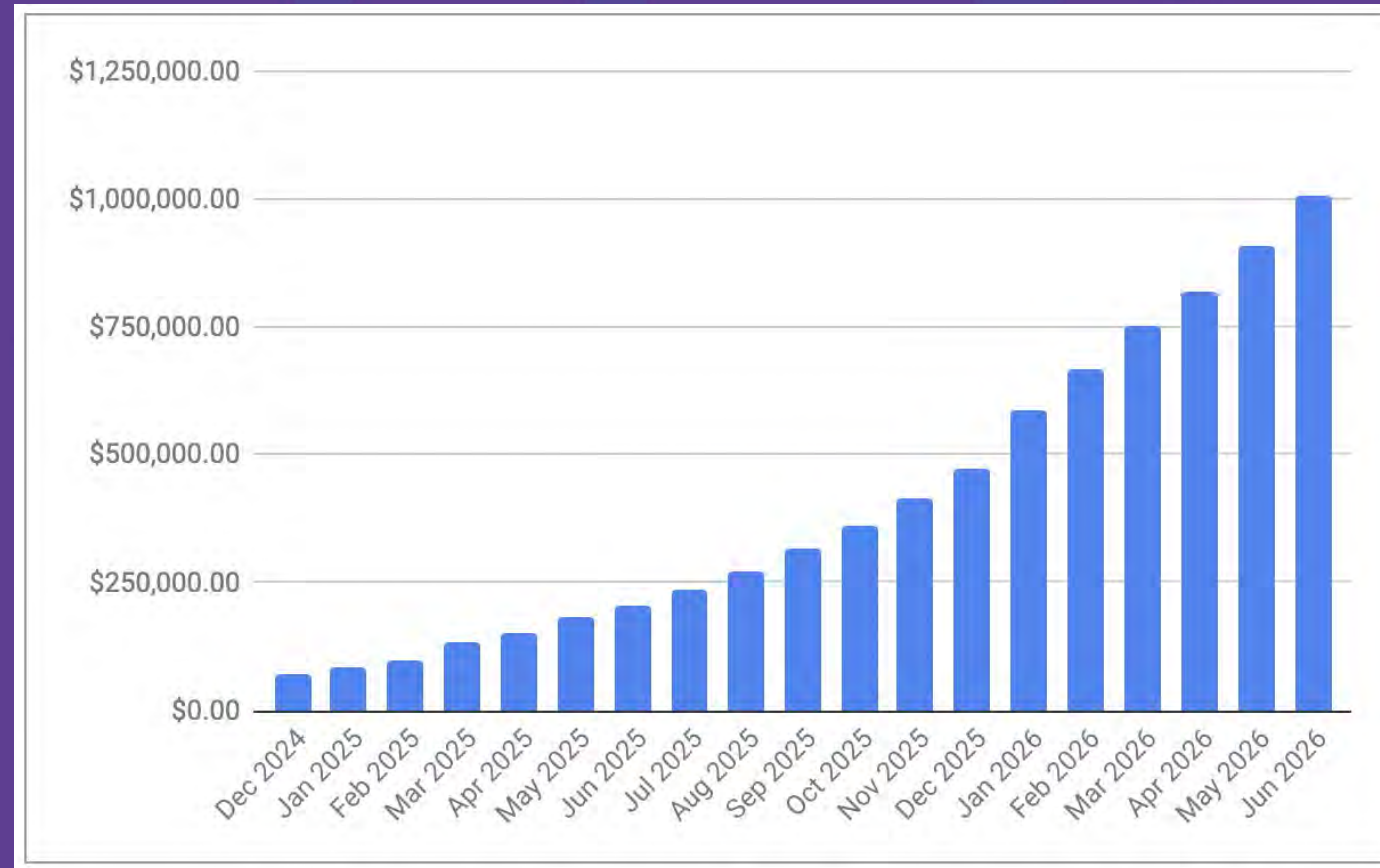
novos

# EXPERIENCES CREATED WITH OUR TECHNOLOGY

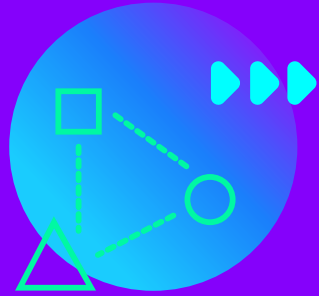


# TRACTION

We are on our way to the first \$1m in ARR with exponential growth ahead of us based on the already signed contracts.



# WHATS SETS US APART



## Depth-of integration

ROOK has established a high level of integration with each data source provider, resulting in accurate and comparable data across users. We employ advanced processing techniques, including harmonization, cleaning and normalization, to delve deeper into data analysis. This ensures the data is refined and standardized, enabling more precise insights and reliable comparisons between users.



## Health Score

The ROOK Health Score introduces a unified metric to evaluate user health, irrespective of the data source. This simplifies health tracking and offers a single reference point for assessing user well-being, enabling a holistic view of individual health. It delivers a user-friendly score, ranging from 0 to 100, which reflects your users' current health status.



## FHIR-compliant

ROOK facilitates the provision of FHIR-compliant (Fast Healthcare Interoperability Resources) wearable data by seamlessly integrating with IRIS from InterSystems. This integration empowers you to effortlessly exchange data within the broader healthcare ecosystem.

# TEAM WITH EXPERIENCE IN HEALTHCARE, FITNESS, AND SOFTWARE



- **Based in Miami and strong tech-team in LatAm**
- **C-Corp Delaware**



**Marco A. Benítez**  
CEO / Founder



**Daniel Martínez**  
CTO / Founder



**José Iván Esquivel**  
PM / Founder



**Jonas Dücker**  
COO / CMO



# FUNDING

## We have raised \$2 million USD

- Successfully launched product with strong early engagement — high NPS and retention
- Executed our first go-to-market strategy with outstanding results: \$1M+ in ARR signed and \$500K+ already live

### Investors that joined our mission:

- NuFund
- CrossOcean Ventures
- Plain Sight Capital
- Techstars

**Backed by InterSystems:** Investment, Partnership & Incubation



# THE ASK



## We are raising \$1.5M

- Out of which we've already raised \$1M, and are now targeting the remaining \$500K.



## Use of funds

- Accelerate client activation by building a Customer Success department and launching a product-led onboarding motion.
- Expand cybersecurity standards and obtain key data privacy certifications to fully convert already-signed enterprise clients.
- Prepare the company and team structure for a successful Series A raise and execution.



## Goal:

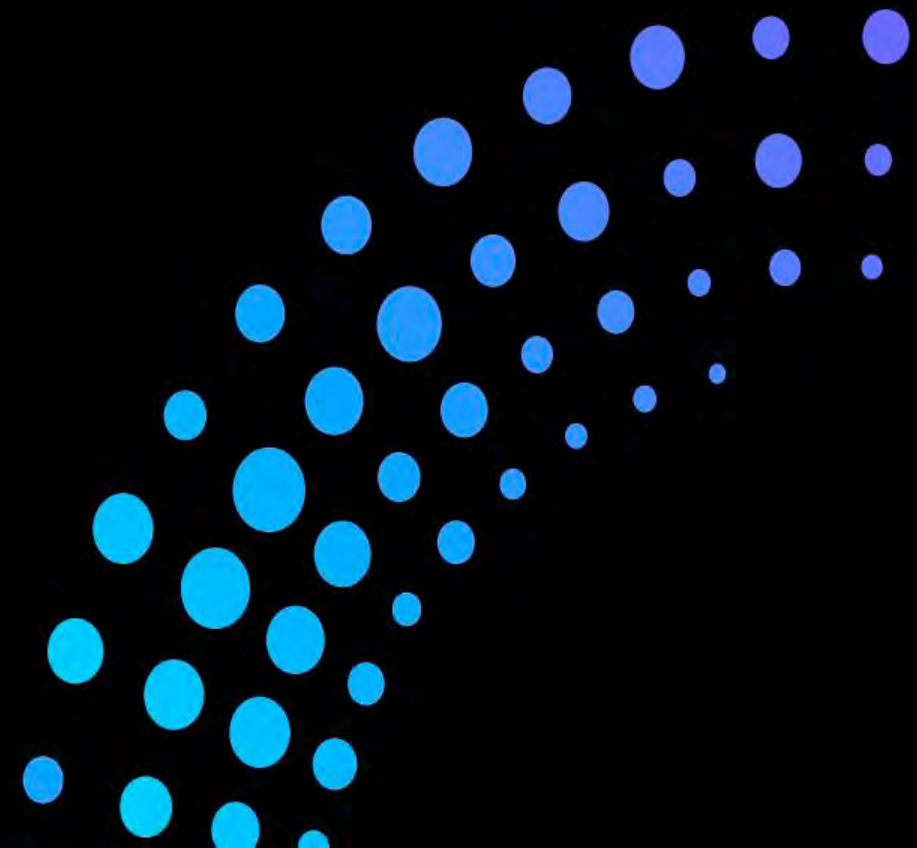
- Reach break-even at the end of the year at \$1M in ARR
- 100+ clients beginning of 2026
- 1m+ active end-users beginning of 2026
- Prepare for Series A in 2026

Let's make this world  
a healthier place together

You can contact us at:  
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+1 (786) 252-6819  
[www.tryrook.io](http://www.tryrook.io)  
Meeting Link

**ROOK**

# APPENDIX



# ROOK'S COMPETITIVE EDGE

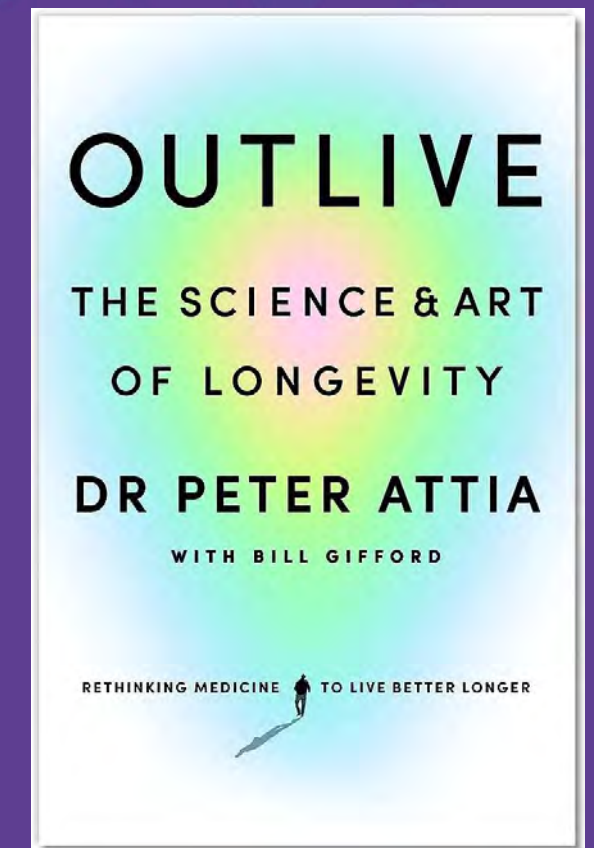
-  Focus on data needs of enterprise health organization
-  Virtuosity "doing the common, uncommonly well"
-  Health insights for the digital health
-  Integration types targeting Digital Health
-  Health score validated by industry professionals
-  Portal that considers the unique needs of this audience
-  Brand positioning and content targeting this market specifically
-  Competitive Pricing that helps our clients grow

# WE ARE ALIGNING OUR PRODUCT WITH THE FUTURE OF HEALTHCARE, MEDICINE 3.0

“We need a fundamental shift in our approach to healthcare from reactive to preventive. Medicine 3.0 is predicated on evidence informed as opposed to evidence based guidelines. It is predicated on absurdly early preventative measures for chronic conditions (not acute conditions), which are now the dominant source of morbidity and mortality. Medicine 3.0 has to be highly personalized. We’re not yet in medicine 3.0, but we’re in that transition.”

-Dr. Peter Attia

ROOK has the opportunity to provide the data and insights to companies who inform, guide, and direct the population to positive health outcomes. By aligning our brand with this movement we connect not only at a business level, but also at an emotional one.






# DIGITAL HEALTH > INSURANCE TECH > CORPORATE WELLNESS

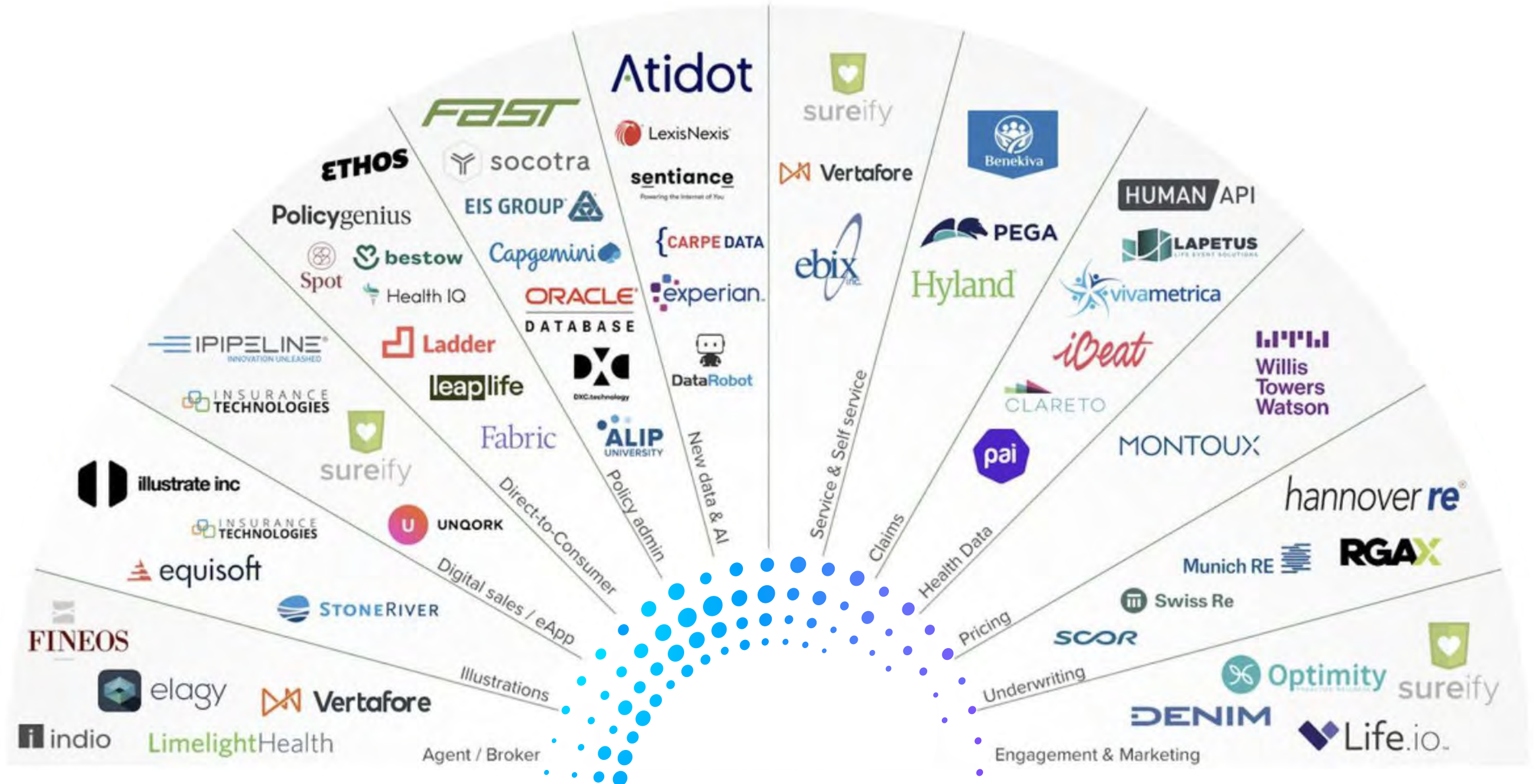
1. Traction with the digital health sector
  - a. Ready to leverage wearable data and it directly increase impact
  - b. \$77B Annual market growing at 17.10% CAGR
2. Insurance companies will naturally follow
  - a. Reduce cost of healthcare with shift towards prevention
  - b. \$4.3T Annual market growing at 5.4%
3. We can use our learnings to then support Corporate Wellness
  - a. Employers incentivized to improve employee health
  - b. \$225B lost in annual productivity due to health related absenteeism



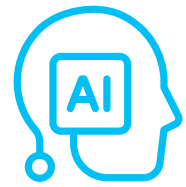
# DIGITAL HEALTH AND OUR ROADMAP

-  Continuous Glucose Monitoring and Nutrition
-  DNA testing and Lab Testing
-  Longevity focused fitness recommendations
-  Nutritional strategy and insights
-  Sleep insights
-  Refined Health Scoring
-  Language, Structure, and Tools that specifically support Digital Health

# LIFE INSURANCE ECOSYSTEM



INSURTECH  
INNOVATION MAP  
EXPLAINS  
EMERGING  
TECHNOLOGIES

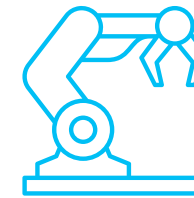


## Artificial Intelligence

1

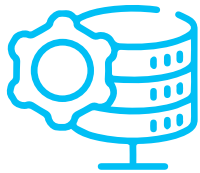
Our experience in AI allows insurance companies to enjoy various benefits like increased productivity, better customer experiences, decrease in frauds and others.

2



## Robotic Process Automation

Robotic Process Automation acts as a tool set to accelerate the way businesses function, leaving tedious, repetitive, iterative tasks for bots and building opportunities for efficiently leveraging the workforce.

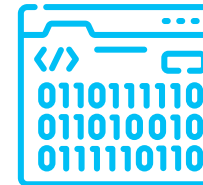


## Data Science

3

Data Science helps you to analyse real-time data and process information to create a better and faster ecosystem. Using Data Science we offer to build you data dashboards, scraping algorithms and automation scripts.

4



## Low Code

Low-code development platforms have taken over the market pretty quickly and the insurance sector is also one of the markets that are adapting to these new platforms, as it has various benefits and can see massive growth in its usages over the coming years.

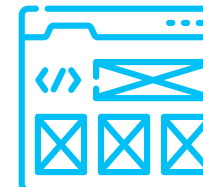


## Blockchain

5

Integrating blockchain not only reduces the administrative burden and costs, but also improves security, and allows sharing information easily. Since the data stored on the blockchain is secure and cannot be altered, it can also help in reducing insurance fraud.

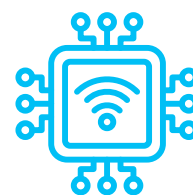
7



## Personalization And Data

Insurance companies use the data collected from devices and smart-phones to identify the needs and wants of their customers and create policies tailored to their needs. Using data to target customers allows for a better customer experience and also helps in accurate risk assessments.

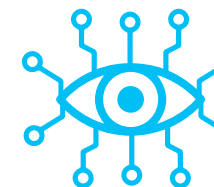
6



## Internet of Things

Our IoT solutions allows data to be collected and exchanged continuously across networks, thereby speeding up and optimising the process of claims, minimising data duplications and largely eliminating customer frustrations.

9



## Predictive Analysis

Various insurance companies are using predictive analytics for finding out the risk status, frauds, outlier claims and future trends, which helps them in avoiding any mishaps and losses.

8

## Chatbots

The bots will not only be able to explain the policies, and processes, but also be able to answer queries that customers have, without any human interventions saving a lot of time and cost to the insurance companies. It also allows seamless interaction with the customers and 24x7 support.



# POWERFUL CONNECTION UNLOCKS VALUE

## Digital insurance platform

### Connected people, health and wellness

**WEARABLE FITNESS MONITORING DEVICES**

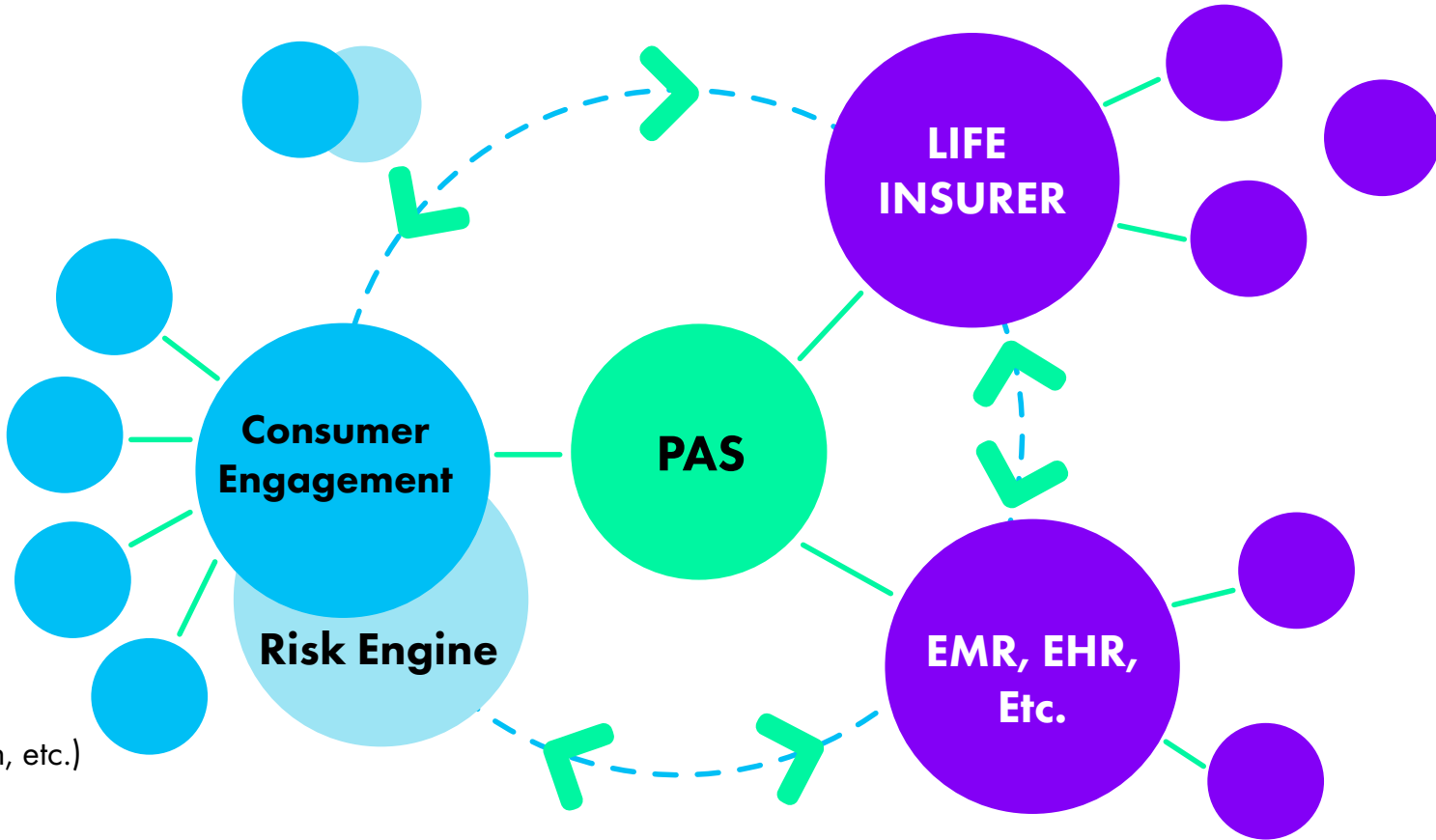
**LOYALTY PROGRAM**

Points awarded for healthy behavior

**CASHBACK**  
(on premiums)

**MENTAL HEALTH**  
(e.g. stress reduction)

**WELLNESS PROGRAMS**  
(e.g. smoking cessation, nutrition, etc.)



**PERSONALIZED PRODUCTS, RATING**

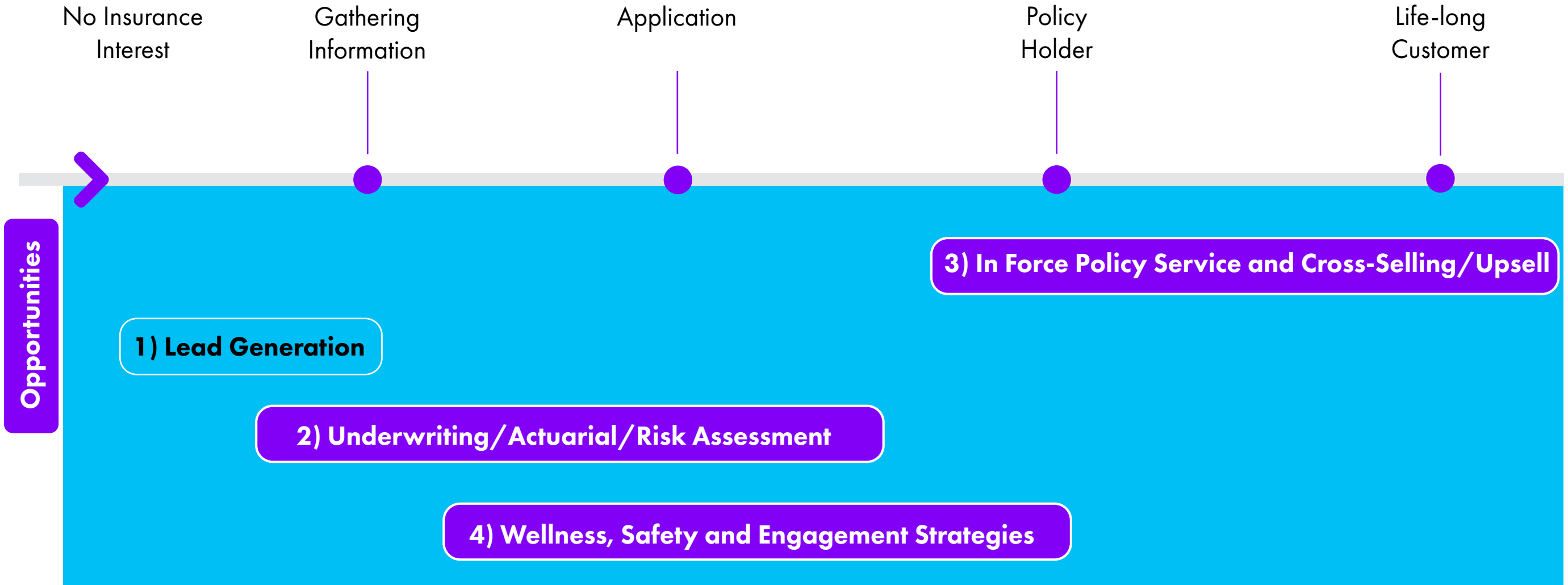
**NEW UW DECISIONING**

**PAY AS YOU LIVE**  
Premium based on healthy activities and changes over time

**TRADITIONAL UNDERWRITING DATA**  
e.g. ExamOne, MIB

**HEALTHCARE PROVIDERS DATA**  
e.g. Hospital, Medicine HIV test, nutrition advice

# INSURANCE PROSPECT VALUE CHAIN



# ROOK APPLICATION TO THE INSURANCE VALUE CHAIN: PROBLEMS AND SOLUTIONS

**Limited growth and innovation** for evolving customer segments

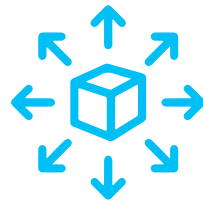


PRODUCT

Enable calculation of risk for life & disability insurance

Faster, more comprehensive access to clinical data

**Needs of consumers are evolving** while adoption of tech by incumbent insurers is slower



SALES & DISTRIBUTION

Enabling insurtech-based/innovative models for sales and distribution with fast API-based clinical data

**Outdated, slow and expensive.** Needs to evolve with new data sources and models



UNDERWRITING

New opportunities for risk models

The gold standard of clinical data for risk assessment

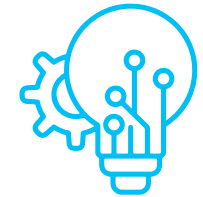
**Limited technology adoption.** Opportunities for rapid uptake of online solutions



CLAIMS & OPERATIONS

Valuable data for adjudication of claims

**Limited technology adoption.** Opportunities for rapid uptake of online solutions



INNOVATION

Enable incumbent insurers and service providers to offer enhanced, integrated technology and interoperability

# STRENGTHENING OUR EXPERTISE IN HEALTH AND INSURTECH



**Dr. Christy Lane**



**Co-Founder Stanford Wearable Health Lab**

Stanford University

Jan. 2014 - present • 10 years 5 months



**Vivametrica**

10 years 4 months



**Director of Insurance Solutions**

Health Gorilla • Contract Part-time

Nov. 2022 - present • 1 year 7 months



**Marissa Buckley**



**Co-Founder**

RevUp

Jun 2023 - present • 1 year



**Security First Insurance**

12 years 10 months