ELXR

BIOHACKING · OPTIMIZED LIVING

Physician-Supervised Biohacking, Unified

Biomarker testing · clinical peptides · at-home IV · telehealth · holistic coaching — one luxury membership, fully operational and selling within 90 days of funding.

THE ASK

$5.0M for 37.0% · $8.5M PRE-MONEY

A Venture of The Wheelhouse Collective

Investment Prospectus · July 2026 · Private & Confidential — Not for Distribution

Executive Summary

ELXR is a physician-supervised biohacking commerce and membership platform uniting what today requires 5–10 disconnected providers — biomarker testing, clinical peptides, at-home IV therapy, telehealth, and holistic coaching — into one curated, luxury subscription. B2B clinical sales are live today; with funding, the platform is fully operational and actively selling within 90 days of close.

$6.87T Global wellness economy (TAM baseline)	**$38B → $217B** Global biohacking, 2025 → 2035	**90 DAYS** From close to fully operational & selling	**70% GM** Blended membership gross margin trajectory

Why ELXR Wins

- **The two hardest diligence risks are closed —** Dr. Amol Rao — triple board-certified in Internal Medicine, Hematology, and Oncology — is signed as exclusive Medical Director; a six-market GCC/Africa distribution pipeline is active with Homaizi Pharma.
- **No competitor runs the full stack —** Hims & Hers, Everlywell, Thorne, and Oura each own one layer; none combines personalization, clinical therapeutics, delivery, and physician supervision in one subscription.
- **Four engines de-risk each other —** clinical B2B generates near-term cash, corporate wellness scales distribution, DTC builds the brand, and membership compounds recurring revenue.
- **Priced as luxury, defended by medicine —** closer to a concierge-medicine retainer than a supplement subscription — a positioning competitors cannot copy without physicians.
- **Time-sensitive on three fronts —** a favorable peptide-compounding regulatory window, a clinical lock that must be activated, and distributor attention that is perishable.

Five-Year Base Case

Scenario	Y5 Revenue	Y5 EBITDA	Subscribers	At 3.0x Revenue
Downside	$95M	$20M (21%)	12,000	$285M
Base	$135M	$31M (23%)	16,000	$406M
Upside	$155M	$39M (25%)	18,000	$465M

The Market — Fragmented Spend, Exploding Categories

Health optimizers currently coordinate 5–10 providers and spend $3,000–$5,000 per month with no unified protocol; clinics source peptides and IV programs from fragmented vendors with inconsistent documentation. Every category ELXR touches is in structural growth:

Market	2025 Value	Outlook
Global wellness economy	$6.87T	Baseline TAM
Global biohacking	$38.05B	$216.7B by 2035
Peptide therapeutics	$46.4B	$100B by 2034
Telehealth	$196.8B	23.2% CAGR
Virtual fitness	$40.1B	$128.9B by 2034
Clinical nutrition / meal kits	$39.4B	$79.8B by 2033

The GCC & Africa Wedge

- **Kuwait launch market —** the Kuwaiti peptide market alone grows from $209M to a projected $540M by 2030; the broader GCC health and wellness market from $72.2B to $126.2B by 2033.
- **Ring-fenced structure —** a Kuwait OpCo distinct from the US HoldCo lets regional capital and a local partner absorb GCC execution risk without diluting core platform IP.
- **Local partner in place —** Ziad Elessa leads GCC distribution alongside Homaizi Pharma; discussions have expanded from a single-country thesis to six markets across the GCC and Africa.

The 90-Day Path to Revenue

Window	Actions
Day 0–30	Close funding · finalize supply agreements · activate Medical Director oversight protocols
Day 30–60	Inventory and platform buildout · brand & marketing launch prep · sales team onboarding
Day 60–90	Full commercial launch — platform live, product shipping, B2B and DTC channels active

The Business Model — Four Connected Engines, One Luxury Membership

Engine	Role	Key Economics
Clinical B2B (live)	Near-term cash; practitioner referral channel	MOQ 100 · tiers 5–20% · ~36% GM
Corporate wellness	Employee kits, executive wellness, enterprise reach	$99–$799/employee/mo · 45–65% GM
DTC marketplace	Brand building; higher-margin repeat purchase	1.5x wholesale · 58% GM · $145 AOV
Membership platform	Recurring subscription; retention engine	Blended GM toward 70%

Luxury Membership Tiers

Tier	Price / Month	Gross Margin	Positioning
Essential	$299	61.5%	Concierge monthly kit · virtual consult · custom vitamin/mineral stack · nutrition plan
Performance	$599	67.0%	Bi-weekly kit · custom IV solutions · clinical peptide program · fitness regimen
Elite	$999	71.5%	Weekly kit · GLP-1 program · advanced peptide stacking · priority physician access · quarterly labs

Blended ARPU begins at $559/month and is engineered toward $684 with add-on penetration. A $150 initial consultation fee acts as a qualification gate, reinforcing exclusivity from the first touchpoint.

Clinical Governance

- **Exclusive Medical Director —** Dr. Amol Rao (triple board-certified) owns protocol design, physician supervision, and clinical liability structure.
- **503B sourcing discipline —** outsourced-facility sourcing with full per-product documentation; active monitoring of FDA compounding policy.
- **Supplier-only status formalized —** any commercial relationship involving Dr. Jihad Harmoush is structured strictly as supply — no equity, no governance.

Financial Trajectory & Valuation Comparables

Five-Year Scenarios

Metric	Downside	Base	Upside
Y5 revenue	$95M	$135M	$155M
Y5 EBITDA	$20M (21%)	$31M (23%)	$39M (25%)
Y5 subscribers	12,000	16,000	18,000
Implied value at 3.0x revenue	$285M	$406M	$465M

Category Comparables

Comparable	Revenue	Valuation	Multiple
Hims & Hers	$2.35B	$3.6B	1.5x
Thorne	$650M	$1B	2x
Everlywell	$111M	$1.3B	12x
Oura	$500M	$11B	22x
ELXR (Y5 base, modeled)	$135M	$406M	3.0x

ELXR's Year-5 base case is deliberately marked at just 3.0x revenue — the conservative end of a category where personalization platforms trade at 12–22x — leaving substantial appreciation room between this round and a Series A.

Valuation Step-Up Logic — $6.5M → $8.5M Pre-Money

- **Clinical risk: closed —** a signed, exclusive Medical Director agreement replaces the single largest diligence objection with a governance asset.
- **Distribution risk: actively de-risking —** the Homaizi relationship expanded from one market to a six-market GCC/Africa pipeline.
- **Still conservative —** $8.5M pre-money remains a fraction of comparable platform pricing at equivalent maturity.

The Ask — $5.0M for 37.0%, Structured for Control and Speed

Term	Value
Pre-money valuation	$8.5M
New capital	$5.0M
Post-money valuation	$13.5M
Equity offered	37.0% preferred
Governance	Investor board control seats · reserved-matter vetoes
Capital release	Milestone-gated tranches

Use of Funds — Weighted to the Commercial Engine

Category	Allocation	%
Branding, marketing, outreach, PR & business development / sales	$1,350,000	27%
Inventory & supply chain — product acquisition + shipping	$1,200,000	24%
Core team (executive compensation)	$900,000	18%
Platform technology — international-ready, Arabic localization	$800,000	16%
International expansion — six GCC/Africa markets	$450,000	9%
Clinical enablement & compliance	$200,000	4%
Working capital / contingency	$100,000	2%

Milestone Gates

- **Tranche 2 —** released on 3–5 signed clinical accounts and domestic EBITDA breakeven.
- **International tranche —** released on execution of the first 1–2 Homaizi market agreements.
- **IP locked —** the ELXR name, platform, and GCC/Africa expansion rights held within the TWC-controlled entity.

The Team, Funded Properly — and the Risk Register

Core Team — Market-Benchmarked Compensation

Role	Name	Base	Benchmark
CEO / Founder	Mounir Camel-Toueg	$210,000	2026 Series-A CEO avg ($203K)
CTO / Founder	Karim Barbir	$195,000	Series-A CTO range ($180–280K)
Medical Director	Dr. Amol Rao	$225,000+	Physician-executive, exclusivity priced
GCC/Africa MD	Ziad Elessa	$160,000	Regional GM, multi-market distribution

Approximately $790K annualized base is funded from the $900K core-team line blended with existing revenue contribution; equity vests over four years with a one-year cliff. Incentives tie to account signings, launch milestones, and EBITDA.

Risks & Mitigations

Risk	Mitigation
Regulatory — peptide compounding policy	503B sourcing with full documentation; active FDA category monitoring; physician supervision throughout
Channel ramp / CAC	Practitioner referral engine lowers CAC over time; phased account targets gate spend
GCC/Africa execution	Ring-fenced Kuwait OpCo; Homaizi Pharma absorbs regional execution risk
Team bandwidth	Lean model — contracted NPs, fractional specialists, AI tooling
Clinical / physician risk	Resolved — exclusive Medical Director signed
Distribution risk	Milestone-gated capital release tied to executed agreements

Investor board control plus milestone-gated tranches mean capital is never more than one verified milestone ahead of proof.

The Closing Case — and the Campus Behind It

Why Now

- **Selling within 90 days —** this is a launch, not a science project — B2B revenue is already live and the launch plan is day-sequenced.
- **Regulatory tailwind is a window, not a permanent state —** peptide-compounding policy is favorable today; the round is sized to establish market position while it holds.
- **Every entry precedes a repricing milestone —** signed clinical accounts, the first international agreements, and membership launch each step the valuation up.

The Strategic Ceiling — ELXR Campus

The platform is also the proof-of-concept engine for the ELXR Health & Wellness Resort Campus in League City, TX — a 62-acre, sports-anchored wellness district whose Clinical & Recovery Core inherits the ELXR brand, Dr. Rao's protocols, and the physician-supervision model with no separate medical build. Platform investors gain exposure to a brand whose physical flagship no digital competitor can replicate. (The Campus is offered under a separate prospectus.)

Proposed Cap Table (Post-Round)

Holder	Ownership
Founders (TWC / management)	48.0%
Round investors (preferred)	37.0%
Medical & advisory equity (vesting)	7.0%
Option / incentive pool	8.0%

> *ELXR asks for $5.0M to turn closed diligence risks into an operating, selling, physician-supervised platform in 90 days — priced at 3.0x forward logic in a 12–22x category.*

Prepared by The Wheelhouse Collective · July 2026 · Private & confidential; not an offer of securities or investment advice. Forward-looking statements and labeled assumptions throughout.