



IMPACT Health Holdings

IMPACT Health Holdings (IHH) is a healthcare services platform consolidating and scaling Primary Care Medical Centers and Management Services Organizations (MSOs) in Florida and the Southeast USA. By leveraging a proprietary pipeline of high-performing medical groups, IHH is building a clinically integrated network positioned to thrive under the Centers for Medicare & Medicaid Services' (CMS) mandate to transition to a Value-Based Care (VBC) model by 2030*.

Five Arbitrages	Description
1. Multiple Accretion	Acquire 4–8x, scale into platform valuations 12–20x
2. Consolidation	Centralize MSO Services (contracting, coding/billing, HR, IT, data, etc.)
3. Coding & Data	Capture revenue and strengthen RAF/MLR performance
4. Revenue Cycle Management	Unlock retroactive CMS reimbursements through AI-assisted coding
5. Reinsurance & Data Science	Leverage actuarial modeling, risk stratification, and captive reinsurance



Florida as initial platform. **Texas** and SE USA as expansion.

Entity	State	Acquisition Type	Revenue	EBITDA**	Entry x	Entry Value	Exit 12x	Exit 14x	Exit 16x
C. FL Medical Centers 16 Locations	Florida	Equity Rollover	\$ 82m	\$ 15.1m	10x	\$ 151m	\$ 181.2m	\$ 211.4m	\$ 241.6m
C. FL Medical Centers 6 Locations	Florida	Equity Rollover	\$ 26m	\$ 3.1m	8x	\$ 24.8m	\$ 37.2m	\$ 43.4m	\$49.6m
C. FL Doctors Network ACO/MSO	Florida	Control Acq.	\$ 19m	\$ 5.2m	6x	\$ 31.2m	\$ 62.4m	\$72.8m	\$83.2m
S. FL Medical Centers 4 Locations	Florida	Control Acq.	\$ 34m	\$ 4.2m	6x	\$ 25.2m	\$ 50.4m	\$ 58.8m	\$ 67.2m
S. FL Medical Centers 2 Locations	Florida	Control Acq.	\$ 19m	\$ 2.4m	6x	\$ 14.4m	\$ 28.8m	\$ 33.6m	\$ 38.4m
Texas Doctors Network MSO	Texas	Control Acq.	\$ 120m	\$ 16.1m	8x	\$ 128.8m	\$ 193.2m	\$ 225.4m	\$ 257.6m
TOTAL	-	-	\$300m	\$46.1m	-	\$375.4m	\$ 553.2m	\$ 645.4m	\$ 737.6m

IMPACT Health Holdings Experience and Team

- ◆ Healthcare executives and operators that have collectively transacted on over \$1B of acquisitions in the healthcare services market in VBC.
- ◆ Proprietary pipeline of acquisitions in the VBC marketplace—these acquisitions are sourced through industry relationships. Further pipeline of \$30m+ of proprietary acquisitions in strategic markets throughout Texas and the Southeast.
- ◆ Management teams for initial acquisitions rolling forward all equity, and key stakeholders of acquired entities structuring to stay for larger platform consolidation.
- ◆ Strategically aligned Regional Commercial Bank has provided a term sheet for up to \$150m in a credit facility at competitive rates ($\leq \text{SOFR} + 3.5\%$).

* <https://www.cms.gov/blog/cms-innovation-centers-strategy-support-high-quality-primary-care#:~:text=The%20CMS%20Innovation%20Center's%20Approach,new%20urgency%20to%20this%20work.>

** Central FL Med Centers Platform has audited financials from Grant Thornton. Acquisitions and other entities are pending third party quality of earnings. Texas Network also has audited financials.

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