ORBITCARE INVESTOR TEAR SHEET

FICTIONAL EXAMPLE • OWNER: A. INVESTOR • ORBITCARE.EXAMPLE • UPDATED: AUG. 14, 2026

hustle fund

SNAPSHOT + THESIS

[F] OrbitCare, Inc. | B2B software | Pre-seed | Chicago, Illinois

[F] Owner: A. Investor | Website: orbitcare.example

[F] Scheduling and patient follow-up software for independent outpatient clinics.

[F] Status: Diligence | Created: Aug. 7, 2026 | Updated: Aug. 14, 2026

[J] Clinics lose staff time to manual scheduling and fragmented communication. The case depends on durable integrations, efficient channel sales, and retention beyond founder-led relationships.

ROUND + OWNERSHIP

[F] Assumed form: unmodified U.S. YC post-money SAFE, Valuation Cap, No Discount. $8M Post-Money Valuation Cap; no discount.

[F] Target: $750K | Proposed check: $5K | No separate pro rata or information-rights side letter.

[C] $5K ÷ $8M = 0.0625% cap-based ownership reference, measured after all SAFE money and before priced-round new money.

[C] At conversion, the investor receives more shares at the Safe Price or the lower financing price. Priced-round new money and a new/increased option pool dilute the SAFE holder.

[F/J] July 28 cap table requested. It supplies Company Capitalization inputs and may reveal other securities; it does not itself cause dilution.

TRACTION + FINANCIAL POSITION

[F] July 2026 MRR: $18,700, up from $12,900 in April 2026.

[C] Three-month growth: ($18,700 − $12,900) ÷ $12,900 = 45%.

[C] ARR run-rate: $18,700 × 12 = $224,400; not recognized annual revenue.

[F] 17 paying clinics as of July 31; largest group is 31% of MRR.

[F] Cash: $690,000 as of July 31, 2026. Average net burn: $62,000 per month, averaged over May 1–July 31, 2026.

[C] Simple runway from July 31: $690K ÷ $62K per month = 11.1 months before new financing, assuming cash is available, monthly burn stays flat, and no material working-capital or one-time outflows occur.

TEAM + EXECUTION

[F] CEO: seven years in outpatient-clinic operations, including three as a regional operations lead.

[F] CTO: previously led integrations for a healthcare scheduling product.

[J] Team cut onboarding from six weeks to 18 days after the first five customers stalled.

[J] Gap: no full-time sales leader; current pipeline depends on the CEO.

RISKS + MILESTONES

1. Concentration: reduce largest group below 20% of MRR by Dec. 31, 2026.
2. Retention: produce six-month gross retention for the first 10 clinics by Oct. 31, 2026.
3. Integration: finish the second practice-management integration by Nov. 30, 2026 without adding more than two weeks to onboarding.

QUESTIONS / OPEN QUESTIONS

1. Do customer references confirm reliable integrations?
2. Does the July 28 cap table reveal other SAFEs, notes, warrants, promised options, or commitments missing from the ownership assumptions?
3. Does the signed SAFE match the assumed unmodified YC form?

ACTION / NEXT ACTION

Request two customer calls, the July 28 cap table, and the signed SAFE. Decide by Aug. 21, 2026.

Pass if integrations are unreliable or records reveal material securities or commitments omitted from the ownership assumptions.

SOURCE LOG

Founder update, July 31 | July P&L and cash report through July 31

Customer/revenue export, Aug. 2 | Product demo and founder notes, Aug. 6

Draft SAFE, Aug. 7 | July 28 cap table requested, not received

Fictional educational example only. Not investment, legal, or tax advice. Startup investments are speculative, illiquid, and can result in total loss. Seek independent review from qualified legal and tax professionals.