

# Echo Health Ventures Flipbook

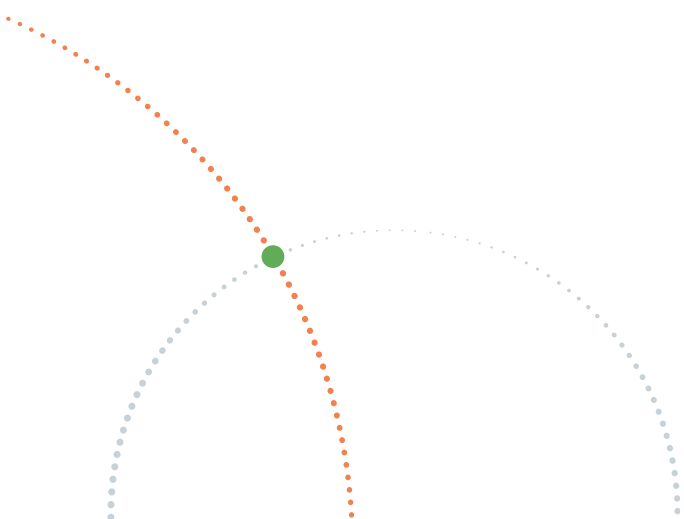




# Echo Health Ventures invests to build and grow great health care companies.

Our mission is to drive systemic health care transformation through hands-on, purpose-driven strategic venture capital and equity investing. We prioritize long-term partnerships and impact, with a focus on accelerating portfolio companies' growth and bringing their innovations to scale nationally.

We know health care transformation requires thoughtful partnerships between enterprises and innovators. Echo brings together Cambia Health Solutions, Mosaic Health Solutions, USABLE Corporation, and BCBS of Tennessee (BCBST) to drive this change and support meaningful health care impact.



The background is a dark teal color with a fine grid of small white dots. There are decorative elements consisting of dotted lines: an orange line curves from the top right towards the center, and a white line curves from the bottom left towards the center. These two lines intersect at a point marked by a solid green circle.

# Our Mission:

To invest, build and grow transformative health care companies through a unique, industry-leading corporate investment platform that drives financial and strategic value for our Alliance Members.



# About Us

We are driving systemic health care transformation through hands-on, purpose-driven strategic venture capital and growth equity investing.

## ECHO AT A GLANCE

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### Integrated

Our governance model and organizational structure are modeled for deep integration at all levels of the organizations we serve



### Active

Purpose-built to deliver highly relevant, actionable innovation to partners and accelerate development of portfolio companies



### Focused

Our active involvement and disciplined investment approach result in a portfolio that accelerates our parent companies' efforts to transform health care



### Proven

Our results demonstrate the value of our approach

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## STRATEGIC INVESTMENT

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### Multiple IPOs and Exits to Date

along with substantial value creation across the portfolio

### 500 Deals

Reviewed per year

### Over 35 Unique Investments

since 2019

## PARENT & PORTFOLIO SUPPORT

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### Over 80% Attachment Rate

of portfolio companies working with one or more Alliance members

### Over 35 Collaboration Agreements

executed since 2017 between portfolio companies and Alliance members

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# Our Differentiation:

## A distinctive approach to driving health care innovation and evolving the traditional Venture Model



Integrated

Our governance model and organizational structure are modeled for deep integration at all levels of the organizations we serve.



Focused

Our disciplined investment approach results in a portfolio that accelerates our Alliance Members' efforts to transform health care.



Active

Our dedicated, trustworthy team is embedded in our health plan organizations to facilitate relationships, help remove barriers, and solve complex problems.



Proven

Our approach has resulted in highly relevant, actionable innovation to partners that accelerate development of portfolio companies.

# The Echo Innovation Alliance

Accelerating health care innovation through high impact partnerships

Investing in transformative companies to drive broad market impact



**A powerful strategic investing engine** designed to expand Echo Health Ventures' proven investment model, driving strategic impact and financial returns for the companies it serves.

Through its depth of investment sourcing and industry relationships, the Alliance will bring together leading health solutions companies with demonstrated experience providing products and services to millions of Americans.

The Alliance will connect market-driven innovations with the scale of innovative health care enterprises like Cambia, Mosaic, USABLE and now BCBS of Tennessee (BCBST). With BCBST, the Alliance extends its reach for our Echo Portfolio companies while also enhancing Blues Plan innovation access.

Echo provides not only capital but also valuable health care market insights, sector expertise and active engagement with each portfolio company to grow and scale their business.

# 2021 Echo Impact and Insights

Echo Health Ventures is focused on investing in companies that personalize health care, supporting individuals and families alike, and has completed significant work relating to these topics. Echo's Strategic Investment Team shared insights from 2020 and the year's challenges, surveying the market reacting to new realities amid the pandemic.

Alongside all of Echo Health Venture's Sector Theme work in 2020, Echo is creating a series of actionable steps to address diversity, equity, and inclusion in our industry. One of the initial outputs of this work was to create a back-pocket infographic for all of our Echo Board representatives and team members to have on hand. The intent of the Infographic is to provide data that underscores the need for DE&I work in our industry.

More information is available on Echo's website.

## TELEMEDICINE

### Telemedicine in the Age of COVID-19: Rapid Expansion of New Models and Functionality

Matt Parmett, Principal at Echo, shares insights on telemedicine trends amid COVID-19, including portfolio companies that are excelling in their response to the crisis.

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## FEMTECH

### Yes, Femtech is Booming. But Disparity in Women's Health Continues.

In this article looking at Femtech, Senior Associate Lindsey Brown shares how women's health has become one of the fastest growing sectors within digital health and how Echo sees opportunity for development and inclusive care starting at the community level.

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## BRINGING VALUE TO OUR HEALTH PLAN MEMBERS

### Echo Brings Innovation to our Alliance Member Organizations, Impacting the Lives of Their Members

BCNC, working with Avalon Healthcare Solutions, generated \$112 million in cost savings and quality improvements for Blue Cross NC members in 2020 by better managing lab services. The cost savings go together with improved health outcomes through the reduction of inappropriate lab testing and better adherence to clinical guidelines. [Press release ->](#)

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## STRATEGIC INVESTING & ALIGNMENT

### Health Care Data Discipline: Finding Opportunity in the Noise

Echo's Partner Jessica Zeaske shares her thoughts on the danger in the "gold rush mentality" surrounding digital health and health care data companies today. However, she notes the incredible opportunity in collecting, transmitting, and transforming health care data.

# Portfolio of Companies

Echo Health Ventures partners with innovative companies that are also thinking differently. Together with our portfolio companies, we're identifying bold, new and original ways to meet the needs of tomorrow's health care consumers in an economically sustainable way.

## COMPANY OVERVIEW

## WEBSITE



**Abacus Insights** offers a cloud-based data transformation platform giving payers accurate, timely and robust data ecosystems that can support analytics or other applications.

[AbacusInsights.com](https://AbacusInsights.com)



**Aitia** is a leader in the application of Causal AI and simulation technology to help pharmaceutical and biotech companies discover and develop new matching treatments.

[Aitiabio.com](https://Aitiabio.com)



**Aledade** partners with independent practices, health centers and clinics to build and lead Accountable Care Organizations (ACOs) anchored in primary care, offering a comprehensive range of capabilities.

[Aledade.com](https://Aledade.com)



**Amwell** is a leading enterprise software company enabling digital delivery of care for health care's key stakeholders.

[Amwell.com](https://Amwell.com)



**Avalon Healthcare Solutions** serves customers with a comprehensive laboratory benefit management program featuring medical policy, claims editing and network services. Avalon redefines the way health plans, physicians and laboratories coordinate laboratory care for millions of patients.

[AvalonHCS.com](https://AvalonHCS.com)



**Cityblock** unites primary care, behavioral health and social services to care for underserved communities through tech-enabled personalized services.

[Cityblock.com](https://Cityblock.com)



## COMPANY OVERVIEW

## WEBSITE

	<b>Cortica Care</b> is a comprehensive, integrated Autism and pediatric behavioral health treatment provider that improves outcomes and reduces care time/costs.	Corticacare.com
	<b>Curation Health</b> offers a prospective risk adjustment platform for value-based care that drives quality program performance by curating relevant insights from disparate sources and delivering them in real time to clinicians and care teams.	CurationHealthcare.com
	<b>DispatchHealth</b> works closely with payers, providers and health systems to deliver on-demand health care to patients directly in the comfort of their own home, reducing unnecessary ER visits and hospital readmissions.	DispatchHealth.com
	<b>Eleanor Health</b> offers a whole-person wraparound care model for substance use disorder and focuses on reducing barriers to high-quality and effective addiction treatment with a focus on outcome measurement.	EleanorHealth.com
	<b>Embold Health</b> is a doctor-led health care analytics company that measures physician performance quality and helps payers and employers identify and guide their members to high-performing doctors, improving patient outcomes and lowering costs.	EmboldHealth.com
	<b>FastMed Urgent Care</b> is the second largest and fastest growing independent urgent care company providing exceptional health care across Arizona, North Carolina, Florida and Texas.	FastMed.com
	<b>Genome Medical</b> makes genomic-based medicine accessible to all by providing rapid access to top clinical genetics specialists via telehealth consultations and its proprietary genomic care delivery platform.	GenomeMedical.com
	<b>Heartbeat Health</b> is a digital heart health company that delivers virtual first cardiovascular disease prevention and management with a focus on improved clinical experience, health outcomes and reduced cost.	HeartbeatHealth.com
	<b>Ideon</b> connects the health insurance and employee benefits ecosystem to provide seamless consumer experiences at every stage of the member journey.	Ideonapi.com

## COMPANY OVERVIEW

## WEBSITE



**Kyruus** is the leader in provider search and scheduling for health care organizations, dedicated to a vision to make health care work better for everyone by connecting people to the care they need, transforming how people find and book care through their multi-channel platform.

Kyruus.com



**Main Street Health** partners with payers and providers to create value-based health care solutions for rural America.

MainStreetRuralHealth.com



**Medix Infusion** provides home infusion and Ambulatory Infusion Center ("AIC") services through its centers in Arizona, Texas, Missouri, Kansas, and Oregon, providing patients with convenient and affordable care.

MedixInfusion.com



**mPulse Mobile**, the leader in Conversational AI solutions for the health care industry, drives improved health outcomes and business efficiencies by engaging individuals with tailored and meaningful dialogue.

mPulseMobile.com



**Octave Bioscience** is a clinical decision support platform for multiple sclerosis that leverages biomarker, imaging and patient data to help guide treatment plans and drug selection.

OctaveBio.com



**Quartet Health** utilizes technology and services to effectively integrate mental and medical health care to improve patient health, quality of life and the cost of care.

QuartetHealth.com



**Scipher Medicine** is developing a precision medicine diagnostics platform for auto-immune diseases, working to ensure patients are prescribed the optimal therapy for their individual disease from day one.

ScipherMedicine.com



**Sempre Health** is a two-sided platform that enables health plans to drive medication adherence and reduce out of pocket costs.

SempreHealth.com



**Springbuk** is the leading employer-facing health intelligence platform that helps identify health savings opportunities in an employer population, providing all stakeholders with actionable insights to improve member health and reduce health care costs.

Springbuk.com

## COMPANY OVERVIEW

## WEBSITE

	<b>Strive Health</b> is a built-for-purpose company working with innovative payers and providers to significantly improve patient outcomes with a high-touch, technology-enabled clinical model that cares for chronic kidney disease patients across their entire health care journey.	StriveHealth.com
	<b>TouchCare</b> provides employees with their very own expert health care assistant, who acts as a single point of contact providing answers, information and guidance, to help them make better health decisions.	TouchCare.com
	<b>TytoCare</b> enables consumers to perform a variety of medical examinations at home, guided by a hand-held device that sends information through a HIPAA-compliant cloud platform to a clinician for an advanced remote visit and diagnosis.	TytoCare.com
	<b>Upfront Healthcare</b> delivers technology-enabled pre-visit services that optimize the ambulatory experience, preparing and supporting patients while streamlining administrative and clinical operations for providers.	UpfrontHealthcare.com
	<b>VaxCare</b> integrates vaccines into the health care ecosystem via a single intelligent touchpoint, transforming the complexity of vaccines into ease, efficiency and end-to-end visibility, reducing the physician's vaccine management burden.	VaxCare.com
	<b>Vori Health</b> is a fully-integrated, virtual health care provider for musculoskeletal (MSK) conditions utilizing a high-touch clinical model and close integration with provider networks to drive better outcomes for patients with an MSK condition.	VoriHealth.com
	<b>Waltz Health</b> offers a consumer-focused, AI-driven marketplace to lower prescription costs, giving consumers access to better pricing options and more information while helping payers take control of their pharmacy benefits.	WaltzHealth.com
	<b>Wildflower Health</b> is a women's health solutions company, offering digital tools and comprehensive bundles for value-based maternity care, with pre-built functionality for all actuarial, clinical and operational needs.	WildflowerHealth.com





# Rob Coppedge

CHIEF EXECUTIVE OFFICER

## OUR TEAM

As CEO of Echo Health Ventures, Rob leads the company's efforts to identify, invest in and grow innovative companies that enable and deliver a transformed experience to health care consumers nationwide.

As part of Echo's unique partnership with its Echo Innovation Alliance members, Rob works closely with the senior management teams and board of Cambia Health Solutions, Mosaic Health Solutions and US Able Corporation to support collaboration with Echo's portfolio companies, accelerate Alliance strategies and more quickly bring health care innovation to national scale.

Rob has more than 20 years of experience in health care venture capital and business building. Before founding Echo, Rob served as the President of Cambia Health Solutions' diversified business unit (Direct Health Solutions). In this role, Rob oversaw Cambia's wholly owned operating companies (including cost and quality transparency market leader HealthSparq; ancillary benefits provider LifeMap) as well as its venture and private equity investing activities. Under Rob's leadership, Cambia invested in nearly 20 companies.

In 2015, Rob co-founded the Cambia Grove, an innovation hub focused on catalyzing and supporting the Pacific Northwest's emerging health care economic cluster. At the Cambia Grove, innovators and entrepreneurs work closely with regional stakeholders to find solutions to pressing health care challenges.

Before joining Cambia, Rob was the founding partner of Faultline Ventures, where he worked with numerous early-stage companies and strategic investors. Previously, he was a Partner at Capitol Health Partners, a Washington, D.C., and New York City-based venture capital firm specializing in early-stage health services and health care information technology.

Active in industry and community organizations, Rob serves on the boards of several health care companies and is a founder and former director of the Nashville-based network of young health care executives, Leadership Health Care. Rob also previously served on the board of directors at the Oregon Museum of Science and Industry (OMSI). He is currently a member of the board of the Cambia Health Foundation and is chair of the Health Executives Network (HELN) and Fellow of the American Leadership Forum.

Rob is a graduate of Georgetown University with a degree in history and is a Chartered Financial Analyst, charter holder. Rob is based out of Echo's Portland, Oregon office.



## Jon Eide

### MANAGING PARTNER AND CHIEF OPERATING OFFICER

As Managing Partner and Chief Operating Officer at Echo Health Ventures, Jon leads operations and helps guide strategy to drive the execution and management of Echo's strategic investments in innovative companies that are transforming the health care industry. Jon brings more than 20 years of deep investment transaction practice, as well as finance and accounting experience to his role as COO, including previously working on several Echo Health Ventures investment transactions as external counsel.

Prior to joining Echo, Jon was a partner in the corporate department of Robinson, Bradshaw & Hinson in Charlotte, North Carolina, where his practice included advising financial and strategic investors with respect to investments and joint ventures with companies in the health care, e-commerce, manufacturing and software industries. Before attending law school, Jon was a Vice President, Finance in the Corporate and Investment Banking division at Wachovia, a Wells Fargo company, and started his career in audit and assurance roles at Deloitte & Touche and Arthur Andersen.

Jon holds a J.D., magna cum laude, from Northwestern University School of Law and a Bachelor of Science degree in business from Miami University.

Jon is based out of Echo's Durham, North Carolina office.



## OUR TEAM

# Dusty Lieb

## MANAGING PARTNER AND HEAD OF INVESTMENTS

Dusty is Managing Partner and Head of Investments. Dusty identifies, invests in, and supports the growth of health care IT and services companies, with a focus on efforts enabling providers and consumers to participate in the evolving consumer-centric and shared-risk health care environment.

Dusty serves as a director on the boards of Life Image, which facilitates medical image exchange, Embold Health, a clinical performance analytics platform, and Dispatch Health, which delivers on-demand health care to patients in their homes. He is also a board observer for FastMed, VaxCare, and MDsave – all Echo portfolio companies.

Dusty served on the Cambia Health Solutions strategic investing team for four years before joining Echo. Prior to this, he spent the majority of his career in financial services, with a focus on health care mergers and acquisitions. Most recently, he worked at Harris Williams & Co., an investment bank, where he executed a range of health care IT and services transactions on behalf of both corporate and private equity clients.

Dusty earned a bachelor's degree in economics from the University of Pennsylvania, and currently serves on the Penn Track and Field Alumni Board and Penn Alumni Interview Program.

Dusty is based out of Echo's Portland, Oregon office.





## OUR TEAM

# Suzanne McLemore

### MANAGING PARTNER AND HEAD OF ECHO HEALTH ADVISORS

Suzanne is Managing Partner of Echo Health Advisors. She focuses on strategic engagement across our stakeholders including our Alliance Members, Echo and our portfolio companies. Suzanne has significant experience leading teams in strategy and planning, innovation, analytics, and partnerships.

Before joining Echo in 2018, Suzanne worked at Cambia Health Solutions as Director of Technology Partnerships. She built a new team and executed multiple partnerships fostering innovation across the company. Suzanne worked at IBM for over a decade in a range of global roles, including strategy consulting, analytics offering development, strategic planning, and as a leader of the joint Apple and IBM partnership. She started her career in Silicon Valley working at start-ups in product, marketing, and strategy.

Suzanne earned a Master of Business Administration from Columbia Business School and a bachelor's degree from Duke University. She recently served on the board of Partners for a Hunger-Free Oregon, an organization working to eradicate hunger, particularly for children.

Suzanne is based out of our Portland, Oregon office.



## OUR TEAM

# Karim Botros

### MANAGING PARTNER, STRATEGIC INVESTMENT

As a Managing Partner at Echo Health Ventures, Karim supports Echo Health Ventures in all aspects of the investment process and fund mandate to drive systemic health care transformation through hands-on, purpose driven strategic investing.

Karim serves on the boards of Curation Health and Medix Infusion, and as a board observer for Cityblock and Aledade.

Karim joined Echo Health Ventures from The MetroHealth System, a public safety-net hospital system based in Cleveland, Ohio with revenues of \$1.2 BN, where he served as Chief Strategy and Innovation Officer. During his tenure with MetroHealth, he also oversaw primary care, behavioral health, dentistry, women's health and pediatrics. Prior to MetroHealth, Karim was responsible for business and corporate development at Cleveland Clinic Foundation. Karim has more than nine years of private equity experience at The Riverside Company and The Jordan Company. He began his career at Baxter International. Karim serves as a board member of JumpStart, Inc., and MCPc, Inc.

Karim holds a Master of Business Administration, Master of Manufacturing Engineering and a bachelor's degree in Biomedical Engineering from Northwestern University.

Karim is based out of Echo's Durham, North Carolina office.



## OUR TEAM

# Kurt Sheline

**PARTNER, STRATEGIC INVESTMENT**

Kurt supports Echo Health Ventures in all aspects of the investment process, from deal sourcing and evaluation through transaction management and execution. He is responsible for providing financial and market support that drives investment initiatives and decisions, and the success and growth of Echo's portfolio of companies.

Kurt has served on the boards of Eleanor Health and Springbuk and as a board observer of Aitia, Circulation, Cortica, Octave Bioscience, Quartet Health, Scipher Medicine, and Strive Health.

Before joining Echo, Kurt helped manage venture capital investments at Cascade Asset Management Company. He also previously served as a Vice President in Cascadia Capital's Healthcare Technology and Services group where he worked closely with management teams in the life sciences, health care technology, and health care services industries, providing business development, positioning, sales & marketing, and transaction advisory and execution services. Kurt began his career at Pathway Capital Management and Merrill Lynch's Healthcare Investment Banking Group.

Kurt earned a Master of Business Administration from the University of California, Berkeley, and a bachelor's degree, magna cum laude, in Economics/Pre-Medical Studies from Claremont McKenna College.

Kurt is based out of Echo's Seattle, Washington office.





## OUR TEAM

# Jessica Zeaske, PhD

MANAGING PARTNER, STRATEGIC INVESTMENT

As Managing Partner at Echo Health Ventures, Jessica identifies and invests in emerging and growth stage companies for Echo. She is a seasoned venture capitalist and board leader, having worked at independent, corporate, and university funds, and has written dozens of investment themes over the years.

She previously served as Director of Healthcare Investments at GE Ventures and as a Principal at Lemhi Ventures, a fund investing in health care services with a focus on market disruption. Prior to joining Lemhi, Jessica worked on forming and spinning out MedTech companies based on university intellectual property at University of Minnesota and Oregon Health & Science University. Jessica began her career writing software for a start-up health care delivery company. She then moved to a merchant bank, Greenspring Advisors, where they launched and invested in data-driven health care start-up companies.

Jessica currently serves on the boards of Avalon Healthcare Services, Eleanor Health, Genome Medical, Heartbeat Health, Ideon, and Wildflower Health and is a board observer at Abacus Insights. She has a breadth of company formation to growth stage experience across health tech-enabled services companies such as Bind On-Demand Health Insurance, Medication Management Systems, Arcadia.io, and PlanSource. Outside of Echo, Jessica serves on the Board of CareQuest Institute for Oral Health, a non-profit seeking to improve oral health for all, is a Trustee for Boston Medical Center's Exceptional Care Without Exception Trust, is an Advisory Board member for Boston Children's Hospital, and is a member of the National Association of Corporate Directors.

Jessica received an undergraduate degree with honors from Stanford University, graduated from Johns Hopkins School of Public Health with a Master of Health Science and PhD, and completed her Master of Business Administration with a focus on Healthcare Administration at Regis University.

Jessica is based out of Echo's Boston, Massachusetts office.



## Omair Ahmed

### PRINCIPAL, STRATEGIC INVESTMENT

Omair supports Echo Health Ventures in all aspects of the investment process, from deal sourcing and evaluation through transaction management and execution. He is responsible for providing financial and market support that drives investment initiatives and decisions, and the success and growth of Echo's portfolio of companies.

Omair currently serves as a Board Observer for Embold Health, Scipher Medicine, Springbuk and Vori Health. He also works closely with Echo's investments in Abacus Insights and Ideon. Additionally, he is focused on companies addressing the Social Determinants of Health, tackling the affordability crisis of health care, or finding novel care models to address high-cost, high-impact conditions.

Prior to joining Echo in 2019, Omair began his career as a consultant for Accenture Strategy, advising health care clients on go-to-market, new product development, and merger strategies. He also brings experience in health care-focused venture capital, through his prior roles at Merck's Global Health Innovation Fund and 7Wire Ventures.

Omair received a bachelor's degree with honors from New York University's Stern School of Business, and a Master of Business Administration degree with distinction from Northwestern University's Kellogg School of Management.

Omair is based out of Echo's Boston, Massachusetts office.



## Troy Arnold

### MANAGING PRINCIPAL, ECHO HEALTH ADVISORS

Troy is Managing Principal, Echo Health Advisors at Echo Health Ventures. Troy focuses on the opportunities that exist between insurers and providers to improve the health care system. In his role, he works directly with Echo's portfolio companies to accelerate their success.

Before joining Echo in 2017, Troy spent 14 years at Blue Cross NC working in a range of strategic development and provider partnership roles. Troy spent several years in the Strategy and Business Development group where he helped develop a new product line for Blue Cross NC's individual business and created several value partnerships with Blue Cross NC's large health systems focused on improving care and affordability. In addition, he also spent over five years in the company's Health Delivery Redesign and the Provider Network groups helping to drive Blue Cross NC's value-based partnership strategy across the state.

Troy earned a Master of Business Administration and a bachelor's degree from the University of North Carolina at Chapel Hill and a Master of Healthcare Administration from the University of Minnesota. Troy is based out of Echo's Durham, North Carolina office.



## Taylor Auten

### **MANAGING PRINCIPAL, LEGAL AND COMPLIANCE**

Taylor is the Managing Principal of Legal and Compliance at Echo Health Ventures. He is responsible for leading the team that manages the legal affairs and regulatory compliance function of the firm. Taylor oversees the structuring and negotiation of investments and internal governance matters, and he assists in Echo's portfolio company and stakeholder management.

Prior to joining Echo, Taylor was a partner in the corporate group of Wyrick Robbins Yates and Ponton LLP in Raleigh, North Carolina, where he advised clients on a broad range of corporate and transactional matters, including venture capital and private equity investments, mergers and acquisitions and financial services regulatory matters. Prior to Wyrick Robbins, Taylor was an associate in the financial services group at Sullivan & Cromwell LLP in New York City.

Taylor received his J.D., magna cum laude, from Duke University School of Law, where he was a Mordecai Scholar, and his B.S. in Civil Engineering, summa cum laude, from North Carolina State University, where he was a Park Scholar.

Taylor is based out of Echo's Durham, North Carolina office.



## Misty Burgner

### **DIRECTOR OF OPERATIONS AND ADMINISTRATION, OPERATIONS**

As Director of Operations & Administration, Misty supports Echo's leadership team in executing on the firm's strategic goals, assists in managing the firm's budget and operating expenses and is responsible for developing and managing communications with Echo's stakeholders.

Misty joins Echo Health Ventures after spending over 20 years with Blue Cross Blue Shield of North Carolina where she served in various roles from Underwriting to Business Planning, and most recently served as the Director of Operations of Legal & Administrative Affairs.

Misty has completed the Heritage Program through Mount Olive College, is a certified Change Agent and Registered Health Underwriter.



## Bob Dolan

### MANAGING PRINCIPAL, ECHO HEALTH ADVISORS

Bob is Managing Principal, Echo Health Advisors at Echo Health Ventures. He is responsible for engagement between Echo Health Ventures, its portfolio, and our Alliance stakeholders.

Bob has over 30 years of leadership roles and health care experience with start-up companies and strategic alliances, strategic business planning, change management, transformation, process design and technology advancement.

Before joining Echo in 2021, Bob was the Executive Director at The Partnership for a Healthy Arkansas (PHA), a shared services partnership that includes four of Arkansas's largest health systems and Arkansas Blue Cross Blue Shield. At PHA, Bob helped lead an effort with clinical, state government, and public health experts to help design the Provider-led Arkansas Shared Savings Entity (PASSE), which became law in 2017. Prior to PHA, Bob was Vice President, Partner Management and Coordination at Life & Specialty Ventures, an ancillary insurance products partnership of six Blue Cross Blue Shield plans. In addition, as CEO, Bob led the Saint Francis Heart Hospital in Tulsa, OK, a start-up specialty hospital identified in 2004 as only the fifth fully digital hospital globally.

Bob received a bachelor's degree with High Honors from the University of Arkansas at Fayetteville.

Bob is based out of Echo's Little Rock, Arkansas office.



## Dustin Duke

### CONTROLLER, OPERATIONS

As Controller at Echo Health Ventures, Dustin oversees the accounting and finance activities for the firm. In his role, Dustin helps manage accounting and treasury functions, the internal operations and investment portfolio management initiatives of the company and also supports the development, implementation, and delivery of Echo's strategic goals and initiatives. In addition, Dustin helps oversee the reporting to Echo's governance bodies and parent companies, the valuations of Echo's managed portfolios, the periodic accounting close process and production of financial statements.

Prior to joining Echo, Dustin worked in public accounting for nine years at BDO USA, LLP and Grant Thornton, LLP in Raleigh, NC. During his time at both firms, he led the day-to-day operations of financial statement audits which included auditing investment companies for Registered Investment Advisors and related funds focusing on direct investment in early-stage life science/healthcare companies, product financing arrangements and fund of funds. In addition, his technical experience includes investment valuations, SEC reporting and related filings, SOX 404, IPOs, purchase accounting/asset acquisitions, impairment and financial statement presentation.

Dustin earned his Bachelor of Science in Business Administration and his Master of Accounting from the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill. Dustin has his Certified Public Account (CPA).



## Yvonne Fiorante

### EXECUTIVE ASSISTANT, OPERATIONS

Yvonne, one of Echo's founding members, is an Executive Assistant on the operations team. Yvonne supports Karim Botros, Managing Partner, Echo Health Advisors and his team.

Yvonne has worked in the health care industry for nearly 20 years. Prior to joining Echo, she worked in the underwriting department at The Regence Group.

Yvonne is based out of Echo's Portland, Oregon office.



## Kady Fisk

### PRACTICE MANAGEMENT ANALYST, OPERATIONS

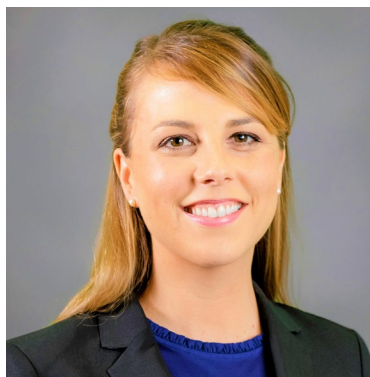
Kady provides a broad array of information management services to enable and support the decision-making functions for our operations and strategic investment teams and coordinates the Echo Health Ventures events.

Before joining Echo, Kady was the Executive Administrator to the operations team and directly supported the Chief Operating Officer at Gates Ventures, Bill Gates' private company. Kady led numerous initiatives, with a focus on creating standard operating procedures surrounding new hire onboarding and daily office management.

Kady attended college at Seattle University, earning her bachelor's degree in Business Administration with a major in Management and a minor in Innovation & Entrepreneurship.

Kady is based out of Echo's Seattle, Washington office.





## Alex Gfeller

### **ASSOCIATE, ECHO HEALTH ADVISORS**

Alex is an Associate on the Echo Health Advisors team at Echo Health Ventures. She focuses on the engagement between Echo Health Ventures, its portfolio and its health plan stakeholders.

Before joining Echo, Alex worked in Human Resources at Duke Health supporting the organization's leadership in employee relations, compensation, organizational and leadership development as well as talent acquisition.

Prior to Duke Health, Alex spent several years at Blue Cross NC, serving as a project manager and chief of staff for the Portfolio Management team, which managed a portfolio of enterprise and departmental projects delivering on the organization's strategic imperatives. Alex began her corporate career at Blue Cross NC as an Associate in its Rotational Development Program with roles in Human Resources, Finance and Enterprise Strategy. Before returning to school, Alex spent her early career working at Girls on the Run of Charlotte in NC focused on strengthening research-based community programming.

Alex earned a Master of Arts in Business Management from Wake Forest University and a Bachelor of Arts in Public Relations from NC State University, graduating Summa Cum Laude.

Alex is based out of Echo's Durham, NC office.



## David Goad

### **SENIOR ASSOCIATE, STRATEGIC INVESTMENT**

David Goad supports Echo Health Ventures in all aspects of the investment process and is actively involved in sourcing new investments, deal execution, and supporting governance and relationships with our health plans across several portfolio companies including holding a board observer position for Medix Infusion.

Before joining Echo, David supported strategic initiatives through the finance department at Cambia Health Solutions. David also held corporate development roles at a publicly traded life sciences company and a privately held early childhood education company, where he focused on corporate strategy, sourcing, and executing transactions.

David holds a Master of Business Administration from Washington State University and bachelor's degree in finance from Towson University.

David is based out of Echo's Portland, Oregon office.



## Jose Guerola

### PRINCIPAL, STRATEGIC INVESTMENT

Jose Guerola is a Principal at Echo Health Ventures actively involved in sourcing, analyzing, structuring, and executing new investments as well as designing and implementing value-add strategies into existing portfolio companies.

Prior to Echo, he was with Johnson & Johnson's investment arm where he was in charge of leading venture and growth investments and providing support in a board capacity to early-stage healthcare companies with a focus on HCIT, tech-enabled services and digital health.

Earlier in his career, Jose worked with Credit Suisse in their M&A group based in New York and was a Private Equity investor at The Carlyle Group, where he focused on corporate buyouts across Business services, Technology, Healthcare and Education.

Jose holds an MBA with Distinction from The Wharton School of the University of Pennsylvania, with double majors in Finance and Strategic Management and a BBA from the Universidad de Lima.

Jose is based out of Echo's Boston, Massachusetts office.



## Amanda Johnson

### SENIOR ANALYST, OPERATIONS

As Senior Analyst of Legal and Administration, Amanda serves as a liaison to Echo's stakeholders and supports Echo's investment process and portfolio management.

Prior to joining Echo, Amanda was the Associate Director of Administration of a publicly traded, RTP-based biotech company focused on improving the lives of those impacted by cancer. Prior to this role, she worked as a paralegal in the corporate group at Wyrick Robbins Yates and Ponton LLP.

Amanda graduated with honors from Wake Forest University.

Amanda is based out of Echo's Durham, North Carolina office.



## Maura Little

### MANAGING PRINCIPAL, ECHO HEALTH ADVISORS

Maura is a Managing Principal, Echo Health Advisors at Echo Health Ventures. She is responsible for engagement between Echo Health Ventures, its portfolio, and our Alliance stakeholders.

Maura joined Echo from the Cambia Grove, a health care innovation hub based in Seattle, Washington where she served as Executive Director. During her tenure with Cambia Grove, she oversaw the creation of programs, events and initiatives focused on supporting the health care innovation ecosystem. Prior to Cambia Grove, Maura was responsible for growing the state of Washington's health innovation industry, serving as Governor Inslee's Life Science and Global Health Sector Lead.

Maura has over twelve years of experience working to shape the health care system from leadership roles in both the government and private sector. She also serves on the board of the Technology Alliance.

Maura holds a bachelor's degree from the University of Washington. She is based out of Echo's Seattle, Washington office.



## Jonathan Rickert

### SENIOR ADVISOR, ECHO HEALTH ADVISORS

Jonathan is a Senior Advisor to Echo Health Ventures, where he supports the Echo Health Advisors team and Echo's portfolio companies.

Previously, Jonathan was the CEO and co-founder of Array Health, a health insurance e-commerce company. Array Health was a pioneer in enabling employers to use a defined contribution approach to health benefits while empowering employees to shop for health insurance coverage. The company licensed its technology to health insurers to support insurer-led, group private insurance exchanges. GetInsured acquired Array Health at the end of 2016, at which point Jonathan joined GetInsured's Executive Team and served as SVP and GM of its Insurer Business. Before Array Health, Jonathan was a management consultant at Booz Allen Hamilton and Arch + Beam Global.

Jonathan earned a Master of Business Administration from the F.W. Olin School of Business at Babson College.

Jonathan is based out of Echo's Seattle, Washington office.



## Ralph Sabin

### SENIOR ADVISOR, STRATEGIC INVESTMENT

As a Senior Advisor to the Echo Health Ventures strategic investment team, Ralph works closely with Echo's senior leaders, investment partners and the market development team to add experience and guidance to the value creation process.

Ralph brings more than 30 years of health care venture investment experience to Echo. He was a co-founder and Managing Director of Pacific Venture Group, a health care IT and services focused venture capital fund which raised and invested \$210 million in health care ventures since 1995. Significant investments include Visicu (NASDAQ eICU), an ICU telemedicine services company sold to Phillips Healthcare; Inspiris, a senior care management company sold to United Healthcare Group (Optum); Care Team Connect, a post-acute SaaS based care coordination company sold to The Advisory Group; and Patientkeeper, a Computerized Physician Order Entry (CPOE) software company sold to HCA. Ralph was recognized as an industry leader by being named to the Forbes Midas List of the Top 100 Technology Dealmakers in 2007.

Ralph Serves on the Board of Directors for Tyto Care for Echo Health Ventures. In addition, he is an Observer on the Boards of CitizensRx, Springbuk and Life Image, and an Independent Advisor to the Board for Upfront Healthcare.

He is a graduate of Loyola Marymount University of Los Angeles and completed a Kellogg Executive Program at Northwestern University. He is a Certified Public Accountant. Ralph is based out of Echo's Seattle, Washington office.



## David Weir

### EXECUTIVE ASSISTANT, OPERATIONS

David serves as the Executive Assistant to Rob Coppedge, Echo's CEO. David joined Regence BlueCross BlueShield of Oregon in 1998 and worked as an Executive Assistant for nearly 21 years before joining Echo in 2019.

David also enjoys giving back to his local community, serving on the board of Portland's Triangle Productions theatre company as secretary.

David is based out of Echo's Portland, Oregon office.



## Annie Weissbach

### SENIOR ASSOCIATE, STRATEGIC INVESTMENT

Annie supports Echo Health Ventures in all aspects of the investment process, from deal sourcing and evaluation through transaction management and execution. She is responsible for providing financial and market support that drives investment initiatives and decisions, and the success and growth of Echo's portfolio of companies. Annie currently serves as a board observer for Wildflower Health and Heartbeat Health and assists with TytoCare efforts.

Prior to joining Echo in 2022, Annie was an investment banking associate with Macquarie Capital's healthcare services and technology group where she advised clients on strategic alternatives including M&A, investment opportunities and capital raising.

Annie began her career as a first full time hire at a digital health startup focused on women's health, where she focused on business development, growth strategy, and product implementation. When the company was acquired by an Echo Health Ventures portfolio company in 2015, she continued to advance the product line with the acquirer, focusing primarily on product development and go-to-market efforts.

Annie earned her bachelor's degree and her Master of Public Health from the University of Virginia, where she was a Jefferson Scholar. She earned her Master of Business Administration from MIT Sloan.

Annie is based out of Echo's Boston, Massachusetts office

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## Jake Yount

### MANAGING PRINCIPAL, ECHO HEALTH ADVISORS

Jake is Managing Principal of Echo Health Advisors at Echo Health Ventures. Jake focuses on the connections between Echo, its portfolio and our health plan stakeholders.

Jake is a strong leader in the healthcare industry with over 25 years of experience leading successful teams in financial, technology, strategic planning and performance roles.

For the past 18 years, Jake has made a significant impact at Blue Cross Blue Shield of NC. His experience includes working on and leading teams in financial accounting, designing commercial products and developing a bundled payment program with BCNC's provider network group. In Jake's most recent role, he led a Health Care divisional operations team that spanned communications, change management, support to senior leadership and financial planning and reporting. He also served as a key liaison to business partners across the organization driving strategic initiatives to completion.

Jake holds an undergraduate degree from the University of North Carolina at Chapel Hill and an MBA from East Carolina University.

Jake is based out of Echo's Durham, NC office.

# Thank You!

STILL HAVE QUESTIONS ABOUT US?  
CONTACT OUR TEAM

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