

PRODUCTIZED ENGAGEMENT / FIXED-FEE / 45 DAYS

# Kincaid IQ Executive Deployment.

A fixed-fee, 45-day engagement that wires your filings, claims, and PBM contracts into the Evidence Spine — and puts board-defensible leakage intelligence in the hands of your CFO, deal team, and directors. You have seen the EBITDA drag. This is how you operate it, **with receipts**, on your own book.



Jeremiah Franklin Shrack

CEO & CHAIRMAN

SIRIUSB IQ · KINCAID RMC · CARMEL, INDIANA

*“A generic AI rollout connects your tools and hopes the output is right. Kincaid IQ ships the receipts built in — governance enforced at compute, not bolted on after.”*

ENGAGEMENT BRIEF · CONFIDENTIAL · SIRIUSB IQ

SEEING THE LEAKAGE IS NOT THE SAME AS OPERATING IT

# The Platform Surfaces the Drag. Deployment Makes It Yours.

You have seen what the platform does — DRAP, PBM spread, rebate under-remittance, formulary distortion, the EBITDA drag traced to the federal filing line. Seeing it once is not the same as running it on your own population, on demand, in a form a board or a regulator will accept.

Connecting your data — DOL Form 5500 Schedules A, C, and H; claims feeds; PBM and stop-loss contracts — configuring consoles for each fiduciary role, and standing up the governance so every output is sealed and defensible is a discipline most teams do not have in-house. **That is the gap this engagement closes.** In 45 days your principals operate Kincaid IQ on your own book, not in a demo.

## 90 min

Board pre-read with sealed receipts — not the days a manual reconstruction takes

## Pre-LOI

Healthcare Risk Score on a target before the letter of intent is signed

## 3-5

Principals connected to role-specific consoles built for their actual mandate

### WHO IT'S BUILT FOR

CFOs carrying the benefits line, PE operating partners hunting EBITDA, M&A deal teams pricing risk pre-close, and boards that need decisions they can defend. **Not HR. Not a broker tool.** The deployment seats the platform with the people who allocate the capital.

## THE 45-DAY ENGAGEMENT

# What's Included.

- **2-day intelligence offsite.** Doctrine first — identity, constitution, the math — then a live war-room build on your own filings. You leave the offsite with real output, not slides.
- **One-on-one role onboarding.** Working sessions per principal — CFO, operating partner, deal lead, board chair — on the workflows they actually run.
- **Data connection.** DOL Form 5500 (Schedule A insurance, C service-provider compensation, H financial), claims feeds, PBM contracts, and stop-loss policies normalized into the Evidence Spine.
- **Secure evidence knowledge base.** Your filings, contracts, and prior diligence — SHA-256 sealed, lineage-tracked, every claim traceable to its source line.
- **Role-specific consoles.** Sales IQ Console over the 5500 database, Rx PBM Defense Contract X-Ray, Stop Loss IQ, Network IQ, Fiduciary IQ — provisioned to the role, not a generic setup reused across seats.
- **Verify™ analyses on your population.** PEPM/PEPY, GLP-1 risk, PBM Waste Index, Shady Broker Index, DRAP, and the EBITDA-to-enterprise-value bridge — run on your book.
- **Governance & guardrails.** Zero-Trust AI: deterministic math separated from generative; the 7-Gate halt-on-fail chain; generative output gated at Gate 6 with admin approval.
- **Output discipline.** Confidence tiering — **Certified**, **Modeled**, **Insufficient Evidence** — on every claim. No export without receipts.

Not included: ongoing platform subscription (priced separately, below), bespoke source-system engineering beyond the connectors above, or full enterprise-wide rollout. Technical build runs in the background; your principals work the consoles.

GOVERNANCE IS THE PRODUCT, NOT THE DISCLAIMER

## Against a Generic AI Deployment.

### GENERIC AI ROLLOUT

Connect the tools. Hope the output holds.

Wires an assistant to your systems and trusts the result. Lineage and explainability — the market's **#1 unsolved capability** — are bolted on later, if at all. The output is plausible. It is not provable.

### KINCAID IQ DEPLOYMENT

Ship the receipts built in.

The Evidence Spine, the 7-Gate Chain, and confidence tiering are the **default**, not an upgrade. Every number is clickable into the filing line behind it. Governance is enforced at compute — a generic rollout cannot retrofit it.

### ● LINEAGE DEFAULT — BY ARCHITECTURE

### SECURITY & GUARDRAILS

- **Read-only by default.** Connectors ingest; they do not act. Any output that writes, sends, or exports passes an approval gate.
- **Role-based data boundaries.** Each principal reaches only the systems and schedules their mandate requires — set before anything goes live.
- **Deterministic / generative separation.** Reproducible math runs autonomously and governed; generative work is gated, cited, and constrained at Gate 6.
- **Nothing publishes without lineage.** The artifact lifecycle — created, parsed, normalized, computed, review-required, published, verified — is enforced, not optional.

BEFORE KICKOFF · COST · GET STARTED

## What It Takes, and What It Costs.

### BEFORE KICKOFF

- Access to your DOL filings and claims / PBM contract feeds.
- Principals available for the 2-day offsite and the 45-day engagement.
- A designated internal point of contact.
- Governance sign-off path identified before go-live.

### COST & TERMS

**Fixed deployment fee**, scoped and agreed in writing before kickoff — not billed by the hour. Additional principals or scope added at fixed cost.

**Duration:** 45 days, including the 2-day offsite.

**Delivery:** in-person offsite, then remote. **Ongoing platform:** \$65 PEPM — \$25 Rx + \$20 health + \$20 IQ — commences post-deployment.

Every dollar of leakage this engagement surfaces is a dollar that does not come out of a premium, a paycheck, or a plan a working family depends on. Receipts defend the participant, not only the balance sheet.

That is why deployment is governance-first. The same rigor that protects enterprise value protects the person inside the plan — without softening the edge that makes it work.

ND

### GET STARTED

Book a working session to scope your filings, your roles, and your fixed fee. [jer@kincaidrmc.com](mailto:jer@kincaidrmc.com)

*I believe in myself.*