



THE JOINT[®] chiropractic

THE JOINT CORP. | NASDAQ: JYNT | thejoint.com

Expansion Strategy and Vision
Peter Holt, President and CEO

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Certain statements contained in this presentation are "forward-looking statements." We have tried to identify these forward-looking statements by using words such as "may," "might," "will," "expect," "anticipate," "believe," "could," "intend," "plan," "estimate," "should," "if," "project," and similar expressions. All statements other than statements of historical facts contained in this presentation, including statements regarding our growth strategies, our vision, future operations, future financial position, future revenue, projected costs, prospects, plans, objectives of management and expected market growth and potential are forward-looking statements. We have based these forward-looking statements on our current expectations and projections about future events. However, these forward-looking statements are subject to risks, uncertainties, assumptions and other factors that may cause our actual results, performance or achievements to be materially different from our expectations and projections. Some of these risks, uncertainties and other factors are set forth in this presentation and in other documents we file with the United States Securities and Exchange Commission (the "SEC").

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In addition to results presented in accordance with U.S. GAAP, this presentation includes a presentation of EBITDA and Adjusted EBITDA, which are non-GAAP financial measures. EBITDA and Adjusted EBITDA are presented because they are important measures used by management to assess financial performance, as management believes they provide a more transparent view of the Company's underlying operating performance and operating trends. Reconciliations of net loss to EBITDA and Adjusted EBITDA are presented where applicable. We define EBITDA as net income (loss) before net interest, taxes, depreciation and amortization expenses. We define Adjusted EBITDA as EBITDA before acquisition-related expenses, bargain purchase gain, loss on disposition or impairment, and stock-based compensation expenses.

EBITDA and Adjusted EBITDA do not represent and should not be considered alternatives to net income or cash flows from operations, as determined by GAAP. While EBITDA and Adjusted EBITDA are frequently used as measures of financial performance and the ability to meet debt service requirements, they are not necessarily comparable to other similarly titled captions of other companies due to potential inconsistencies in the methods of calculation. EBITDA and Adjusted EBITDA should be reviewed in conjunction with our financial statements filed with the SEC.

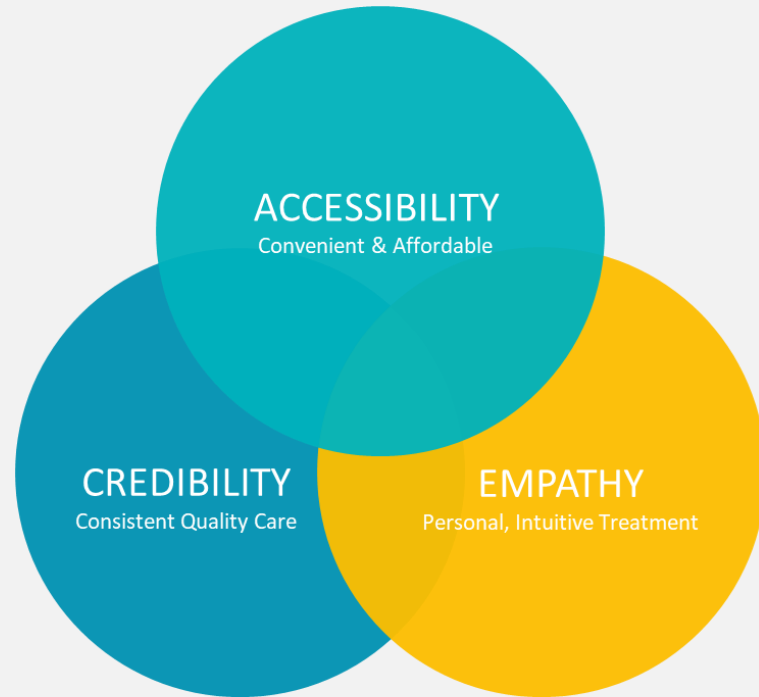
This Presentation Does Not Constitute the Sale of a Franchise

This presentation is not intended as an offer to sell, or the solicitation of an offer to buy, a The Joint Chiropractic® franchise. This presentation shall not be supplementary, applicable, or transferable to any consideration of, or activities relating to, the sale of a The Joint Chiropractic franchise; which sale may only be transacted following the formal delivery and receipt of a Franchise Disclosure Document and the information included therein. There are approximately 14 US states that regulate the offer and sale of franchises: California, Hawaii, Illinois, Indiana, Maryland, Michigan, Minnesota, New York, North Dakota, Rhode Island, South Dakota, Virginia, Washington, and Wisconsin. If you are a resident of one of these states, and are receiving this message in one of these states in person or electronically, or if you may consider or intend to operate a franchise in any of these states, we will not offer you a franchise unless and until we have complied with any applicable presale registration, filing and/or disclosure requirements in the applicable jurisdiction(s).

Business Structure

The Joint Corp. is a franchisor of clinics and an operator of clinics in certain states. In Arkansas, California, Colorado, District of Columbia, Florida, Illinois, Kansas, Kentucky, Maryland, Massachusetts, Michigan, Minnesota, New Jersey, New York, North Carolina, Oregon, Pennsylvania, Rhode Island, South Dakota, Tennessee, Washington, West Virginia and Wyoming, The Joint Corp. and its franchisees provide management services to affiliated professional chiropractic practices.

Analysts & Investors Day



Live a Better You

- Our Mission, Vision and Values
- The Market Opportunity
- Our Path to 1700 Clinics

Our mission is to improve
quality of life through routine
and affordable chiropractic care.

Our Vision

- To be the **premier provider** of chiropractic care in wellness and health plans
- To **double our footprint** through corporate and franchise strategy
- To be the **career path of choice** for chiropractors
- To build a **world-class** organization culture
- To foster a **robust** Regional Developer community
- To build and maintain a **world-class** IT platform

Our Values

Trust: We believe in the reliability, truth and ability of others

Integrity: We adhere to moral and ethical principles

Excellence: We drive a continuous pursuit of optimal levels of performance

Respect: We appreciate the intrinsic value of each individual

Accountability: We hold ourselves and others responsible

Opioid Epidemic Continues

**More than
130 people
die every day**

in the United States after
overdosing on opioids¹

**Almost
58 opioid
prescriptions**

are written for every 100 Americans in 2017,
according to the CDC

**1 in 5
Americans**

will be prescribed opioids
at some point in their lives.

**30% opioid
overdose
increase**

from July 2016 through September 2017
in 52 areas in 45 states.²

1. CDC/NCHS, National Vital Statistics System, Mortality. CDC WONDER, Atlanta, GA: US Department of Health and Human Services, CDC; 2018. <https://wonder.cdc.gov>.

2 Vivolo-Kantor, AM, Seth, P, Gladden, RM, et al. *Vital Signs: Trends in Emergency Department Visits for Suspected Opioid Overdoses--United States, July 2016-September 2017*. Centers for Disease Control and Prevention

Upside For Future Growth



50%

of Americans don't know
what the word
"chiropractic" means

30%

understand chiropractic
but are scared

16%

saw a chiropractor
in the last 12 months

Target Audience: Relief Seekers

What Holds Them Back?

- Lack of time/money
- Fear or misunderstanding about chiropractic
- Lack of familiarity or trust in The Joint

What Moves Them Forward?

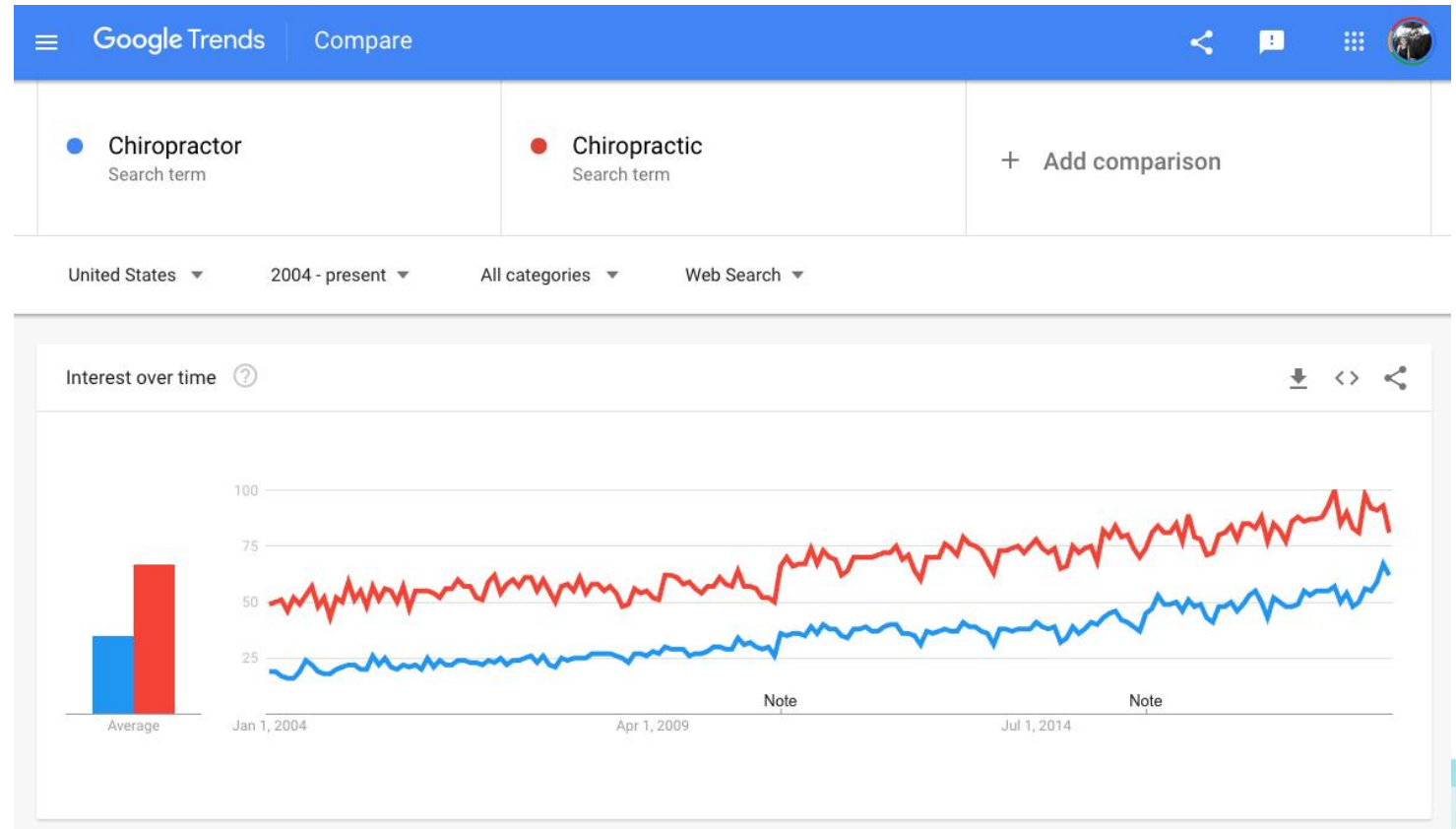
- Breaking point with pain
- Referrals and/or believable testimonials
- Education and comfort with chiropractic



The Chiropractic Market ...

Large & Highly Fragmented

- \$90B spent on back pain each year¹
- \$15B growing chiropractic market²
- 62M Americans saw a chiropractor in last 5 yrs., 35.5M in last 12 mos.³
- ~80% of those surveyed want a non-pharmacologic approach to physical pain⁴
- 55% reduction in the likelihood of people filling prescriptions for opioids in those who received chiropractic care⁵



¹ Bureau of Labor Statistics, U.S. Department of Labor, Occupational Outlook Handbook, 2016-17 Edition | ² IBIS World Chiropractors Market Research Report; February 2019 | ³ Gallup-Palmer College of Chiropractic Report 2016 | ⁴ Noninvasive Treatments for Acute, Subacute, and Chronic Low Back Pain. Ann Intern Med. [Epub ahead of print 14 February 2017] doi: 10.7326/P17-9032 | ⁵ Association between Utilization of Chiropractic Services and Use of Prescription Opioids Among Patients with Low Back Pain

Our Path to 1700 Clinics

454 Clinics

(At March 31, 2019)

404 Clinics

50 Corporate

Continue to experience
unusually low closure
clinic rates of less than 1%

Strong Leadership Team in Place



Peter D. Holt	Jake Singleton	Jorge Armenteros	Jason Greenwood	Amy Karroum	Eric Simon	Manjula Sriram	Dr. Steve Knauf
<i>President & CEO</i>	<i>CFO</i>	<i>VP, Operations</i>	<i>VP, Marketing</i>	<i>VP, HR</i>	<i>VP, Franchise Sales</i>	<i>VP, IT</i>	<i>Director of Chiropractic & Compliance</i>
Tasti D-Lite	EY	Mc Donald's	Peter Piper Pizza	Thermo Fluids	Aamco	Vail/ Versay	Arizona State Board of Chiropractic
Planet Smoothie	American Institute of CPAs	Dunkin' Donuts	Robeks Juice	Taylor Morrison	Mail Boxes Etc.		Northwestern Health Sciences University
Mail Boxes Etc.		Baskin Robbins	Young & Rubicam Group	Foundation for Senior Living	UPS Store	Early Warning	International Chiropractors Association
The UPS Store		Pollo Campero		Pulte Homes	Extreme Pita	Walgreens	American Chiropractic Association
I Can't Believe It's Yogurt						United Airlines	Health Care Compliance Association
						US Foods	

Questions?

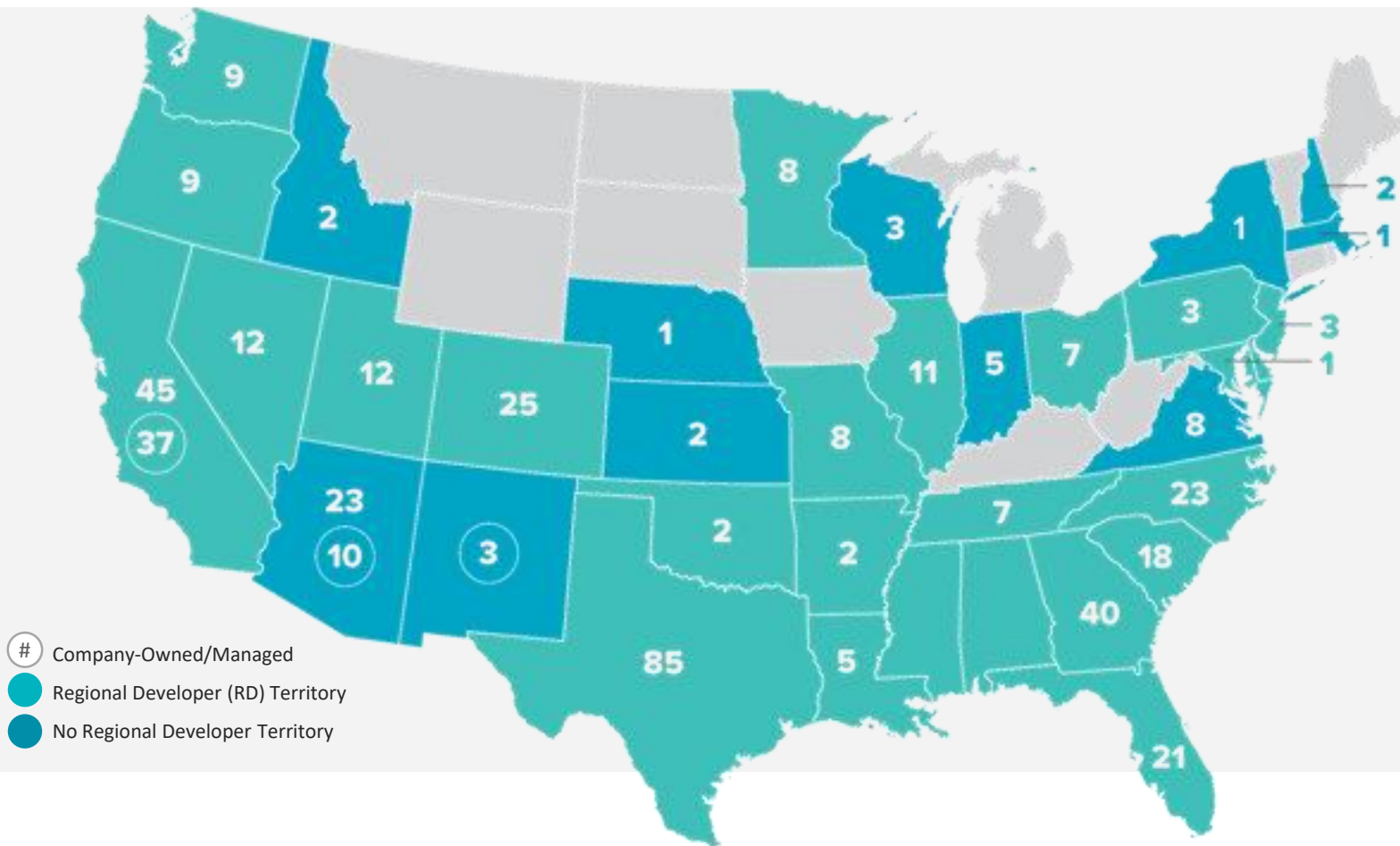


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Long-term Financial Overview
Jake Singleton, CFO

Advancing Robust National Footprint

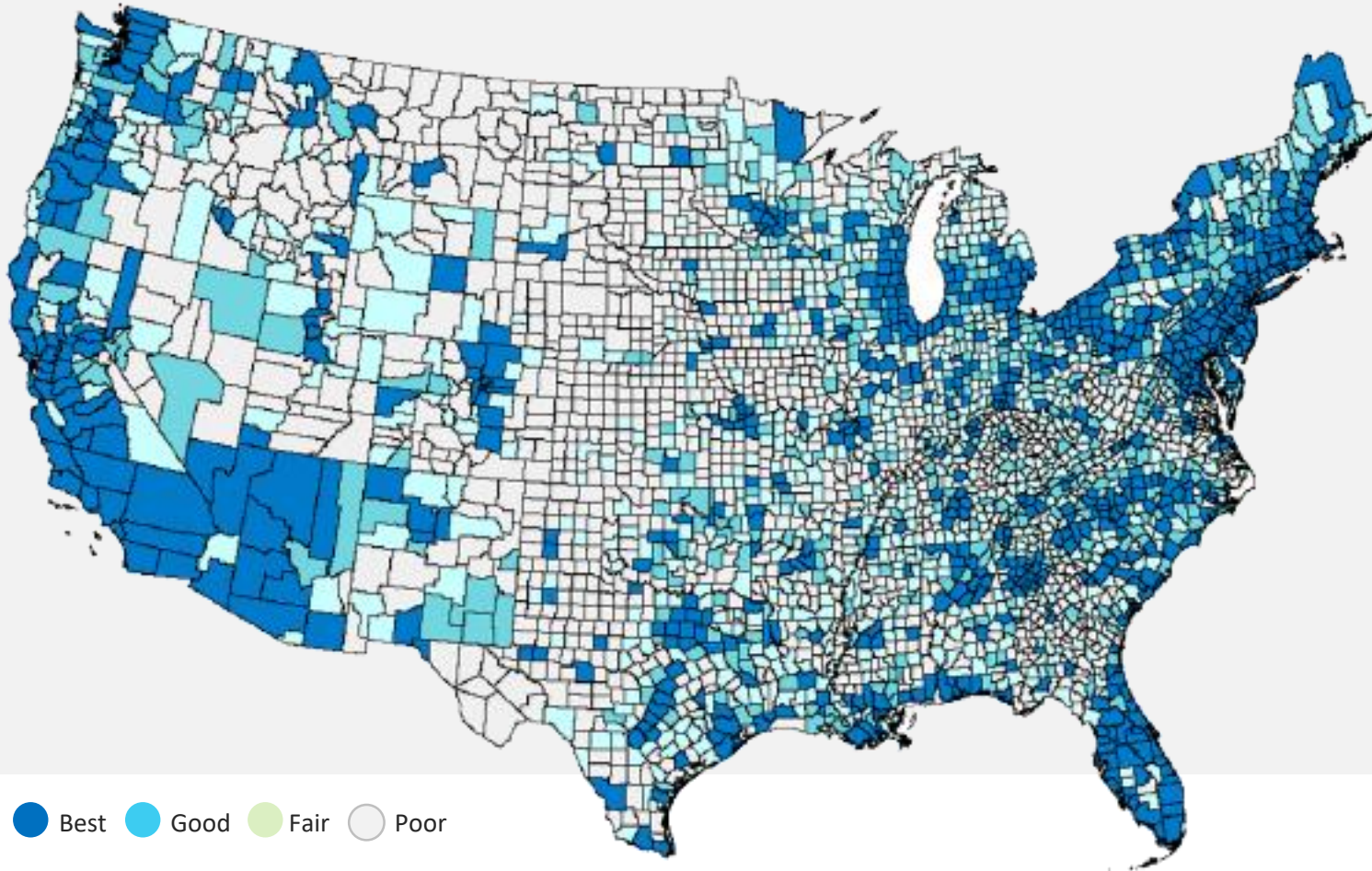


454
Clinics
as of 3/31/19

33
States

Data Analytics Yields 1700+ Clinics

Projected Core Customer & Trade Area Potential *(based on current usage patterns)*



550+k patient records

- Analyze demographics and psychographics
- Model attributes
- Roll across country

1700+ similar points of distribution

Growth Strategy

Building nationwide brand to deliver shareholder value

- Continue to focus on franchise sales
 - Further leverage RD strategy
- Accelerate the expansion of corporate clinic portfolio within clustered locations
 - Build greenfield clinics in clustered locations
 - Acquire franchised clinics opportunistically

Continue Momentum



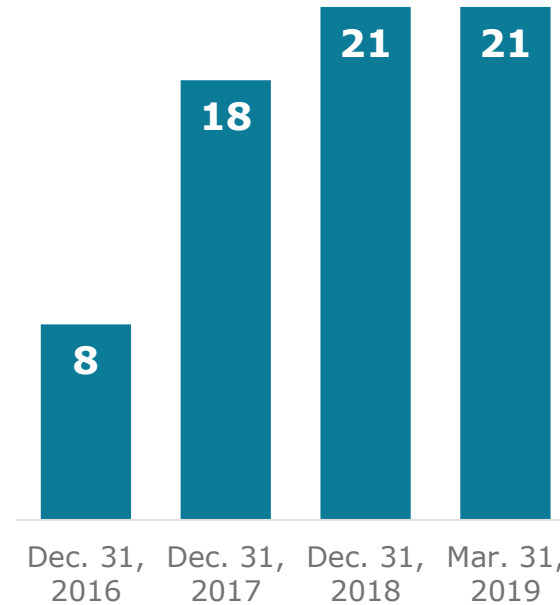
RD Model Proven to Accelerate Scale

1000 units tipping point for national recognition and economies of scale

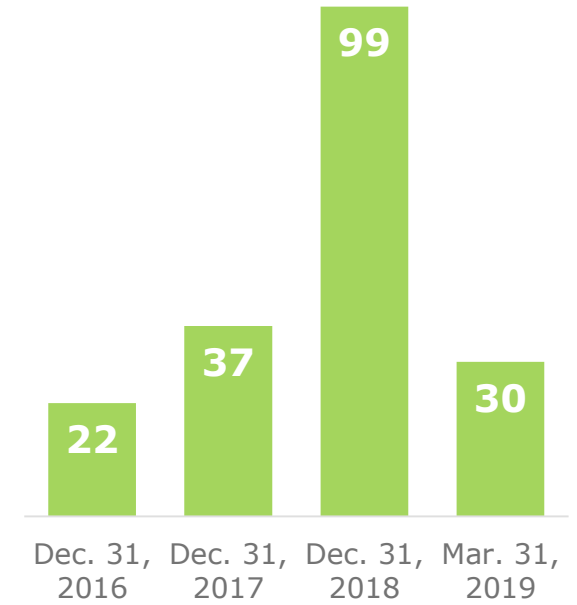
- Regional Developers (RD) model successful for many small-box retail franchises
- RDs pay for territory and manage franchises for revenue split
 - RD license fee varies by area
 - Receives 3% of the 7% royalty on gross sales of RD managed franchises

Percent of Licenses Sold by RDs

100% of in Q1 2019, vs. 89% in 2018 and 49% in 2017



Number of Regional Developers



Franchise Licenses Sold Annually

Capital Allocation & Key Assumptions

Capital Allocation Opportunities

1. Franchise unit acquisition
2. Corporate greenfield development
3. Regional Developer acquisition

Key Assumptions

- Continued franchise unit openings at accelerated rate
- Continued measured greenfield development (funding through operational cashflow)
- Continued franchise unit buybacks on opportunistic basis
- Regional developer territory acquisitions



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Franchise Unit Acquisition

Franchise Unit Acquisition

Objective: Acquire existing units from franchisees and recapture powerful unit-level economics to be immediately additive to corporate earnings

Historical Buyback Activity

- Subsequent to the IPO the Company went on to complete 17 transactions with various franchisees to acquire 32 clinics across CA, AZ, NM and NY
- The average purchase price across these transactions was approximately \$230K/clinic utilizing approximately \$7.3M of capital
- Company repurchased one unit in 2019 in West Covina, CA for \$30K

Buyback Potential

- Company would target franchisees in existing corporate territory (clustering)
- The Company has developed a buyback analysis tool to assist in the evaluation of potential franchise clinics



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Greenfield Development

Greenfield Development

Objective: Develop corporate units to leverage powerful unit-level economics to contribute to corporate earnings

Historical Greenfield Activity

- Subsequent to the IPO, the Company went on to develop 29 units across CA, AZ, NY and IL.
- Company eventually sold or closed 14 corporate units in IL and NY due to underperformance and the Company's cash position

Greenfield Potential

- The Real Estate Group has identified a number of markets for potential GF development around the country up to 250+ units (or 15% of the 1,700 potential clinic sites)
- Potential trade areas were only included if they were Non-RD territories
- Based on current operational overhead structure, we would target a minimum of 8 corporate clinics (i.e. "Rule of 8") in a combination of greenfield or buybacks



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RD Acquisition

Regional Developer Acquisition

Objective:
Recapture
development
rights and 3%
RD Commission

Historical RD Acquisitions

- Subsequent to the IPO in Nov'14 the Company began to repurchase RD territories and made the following acquisitions: Los Angeles, CA - \$507K; San Diego, CA - \$400K; New Jersey - \$145K; Orange County, CA - \$400K; New York - \$130K.
- Subsequent to the Secondary Offering in Nov'15 the Company repurchased the following RD territories: Inland Empire, CA - \$275K; Virginia - \$50K.
- In July 2018, the Company repurchased the RD Territory in Las Vegas, NV for \$278K.
- In January 2019, the Company repurchased the RD Territory in South Carolina for \$682K.

RD Acquisition Pipeline

- 21 remaining regional developers. Natural evolution of franchise system to repurchase territory as they mature, allowing RDs to monetize asset. We hold first right of refusal on all deals

Questions?



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Development Strategy

Eric Simon, VP of Franchise Sales & Development

My Background Eric Simon

22 Years in Franchising on All Levels

Franchisor	Franchisee & Regional Developer	Franchise Research & Consultant
Mail Boxes Etc./The UPS Store & Aamco	Extreme Pita	FRANdata
		

Development Overview Agenda

1

The Road to 1000 Clinics

Continuing with what works:
Regional Developer Strategy

2

State of Development and Current Market Share

3

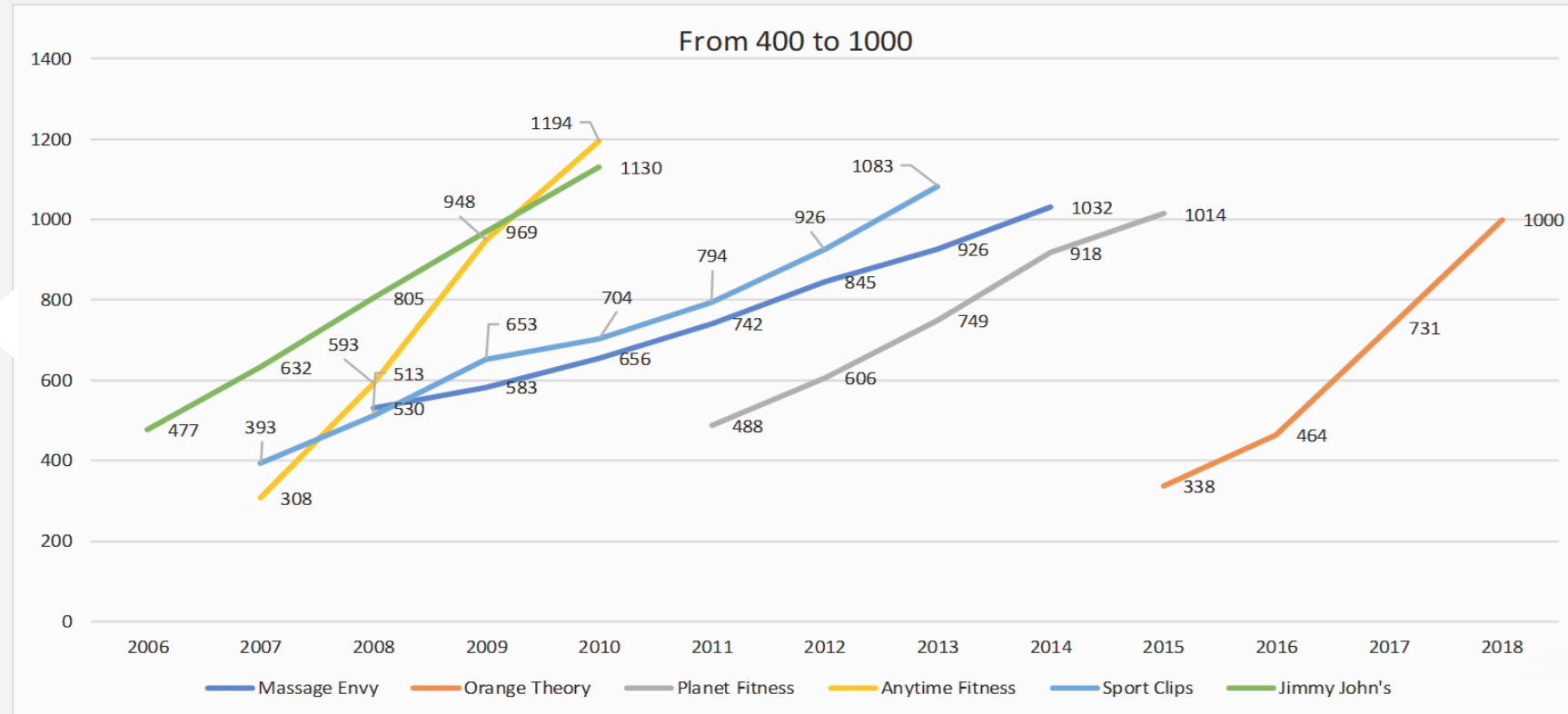
Understanding Our Future Opportunity

4

Creating New Initiatives for Further Expansion

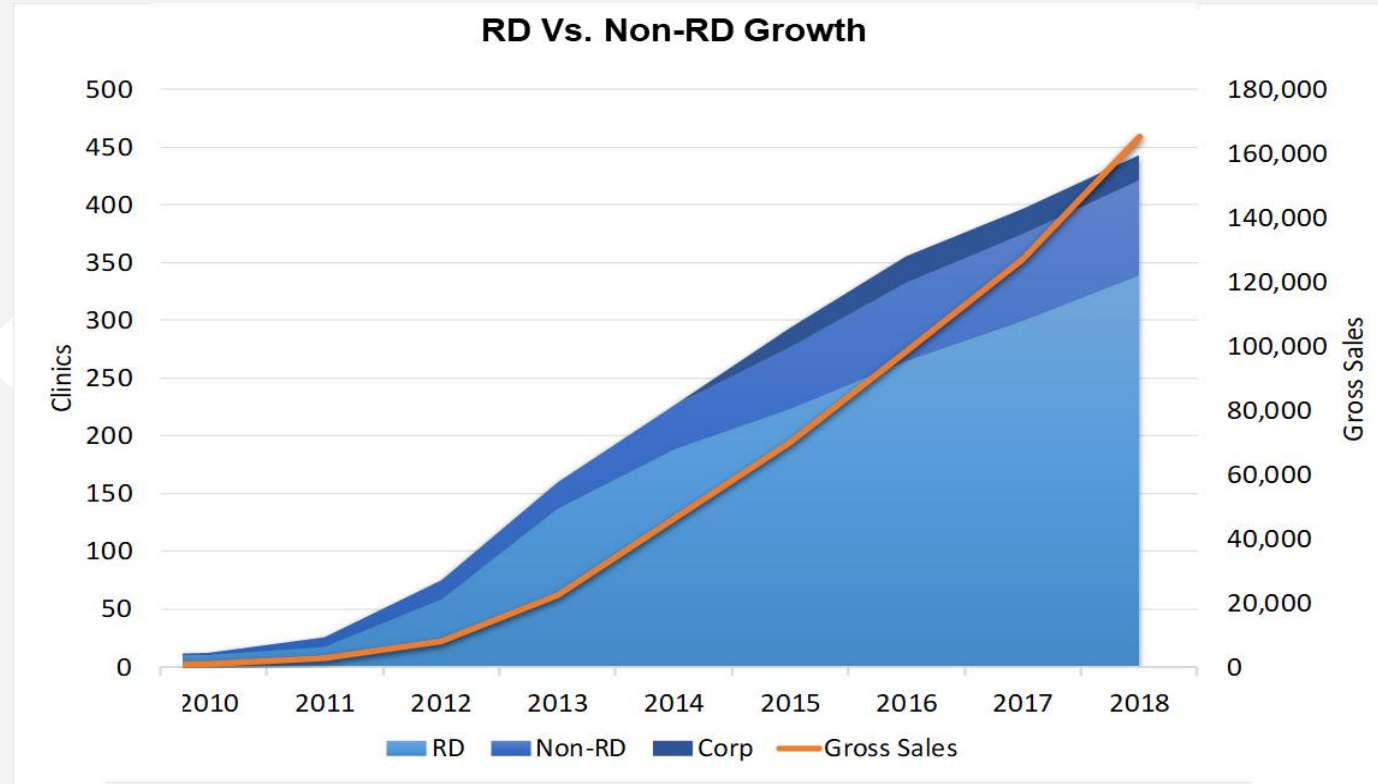
From 454 to 1000 Units

Range from
4-7 years



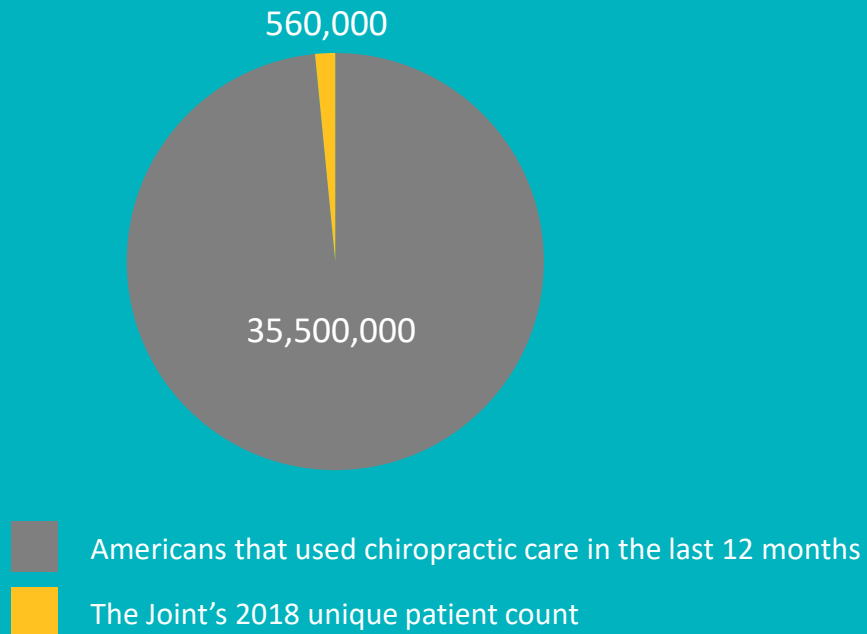
RD Growth vs. Non-RD Growth

2010 - 2018



Brand Growth: National Market Share

The Joint Has 1.07% of Total Market Share



Data

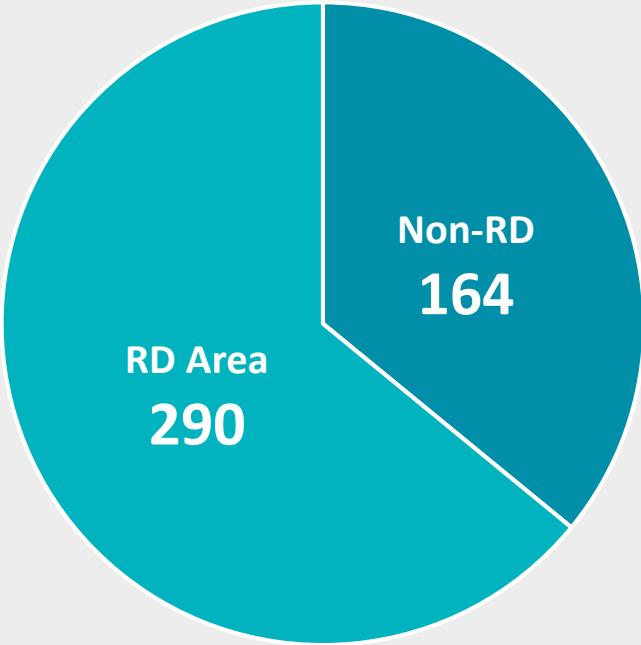
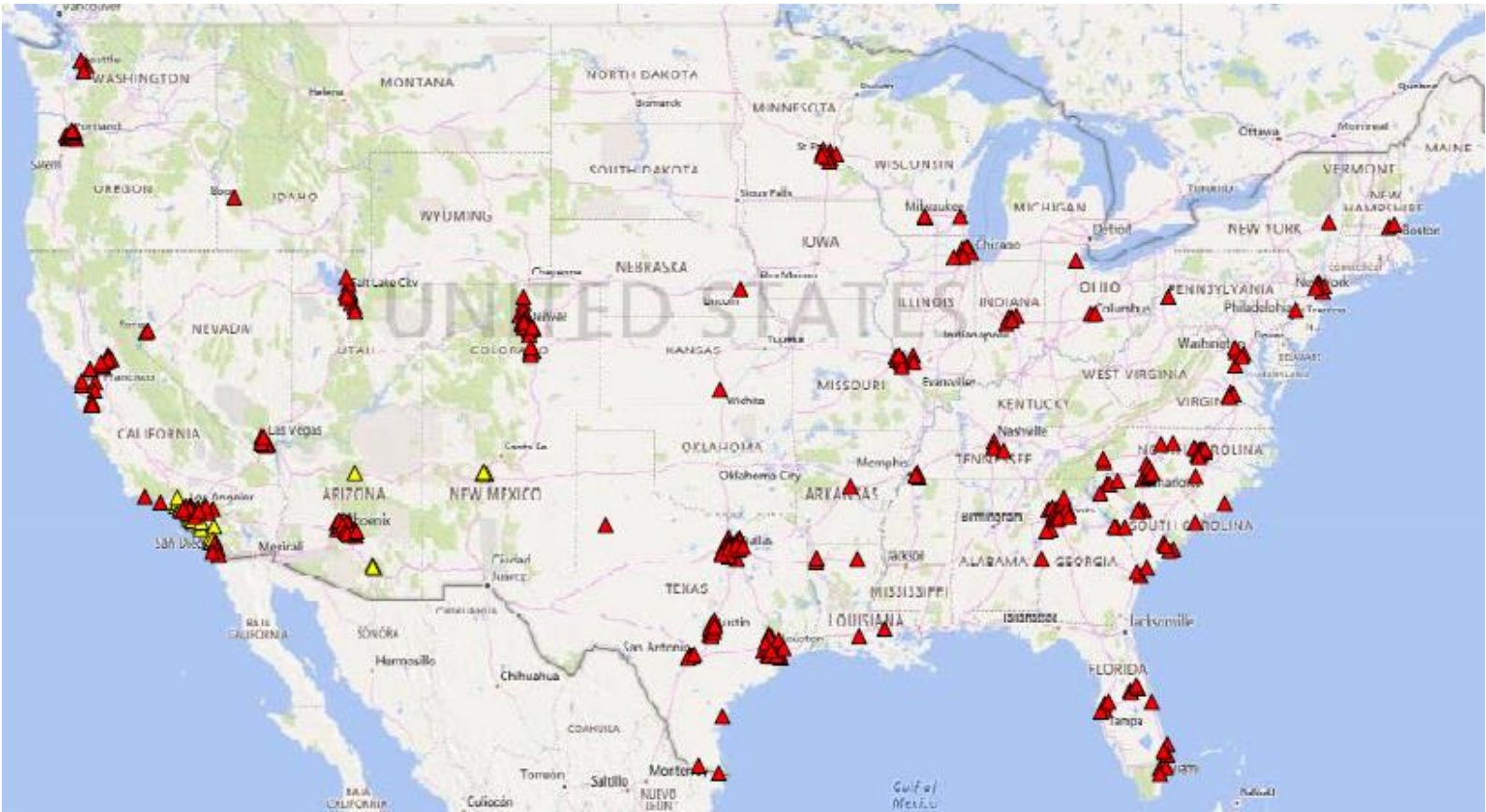
- 52.3M people have used chiropractic care in the last 12 months*
- 560,000 unique active patients in 2018
- 1.07% US market penetration, only 1.07%!

*Gallup-Palmer College of Chiropractic Report 2018

We have a huge opportunity in front of us!

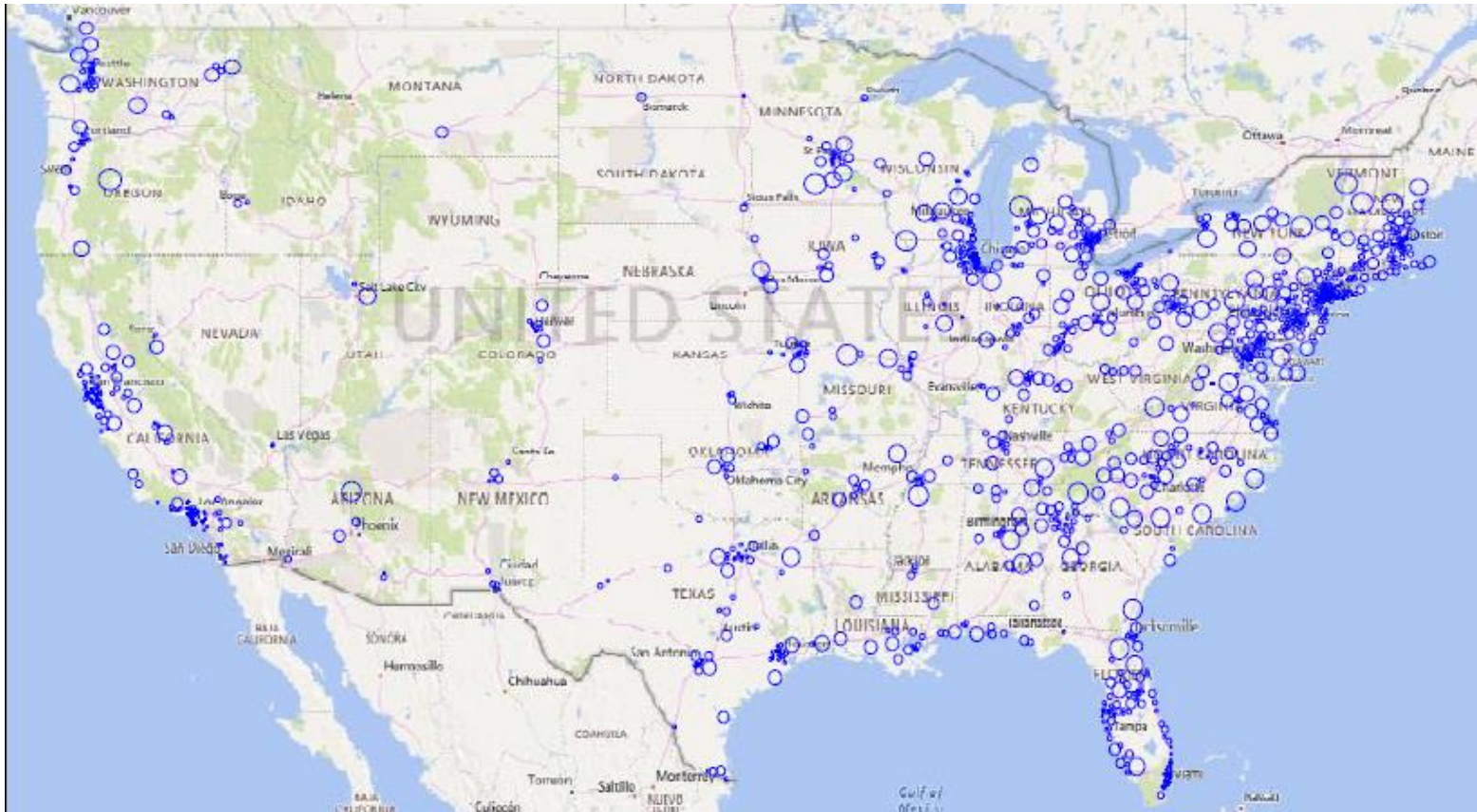
Current Clinic Footprint

454

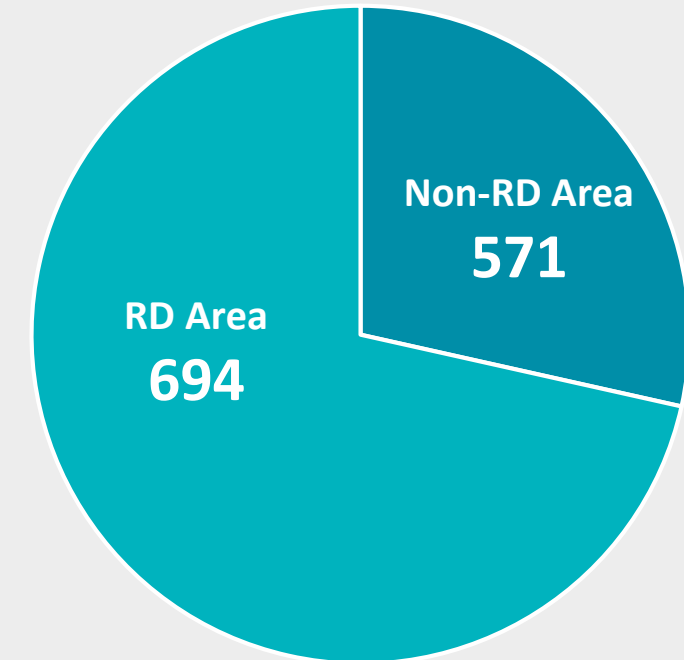


Future Potential

Based on current The Joint patient demographics & America's usage of chiropractic care

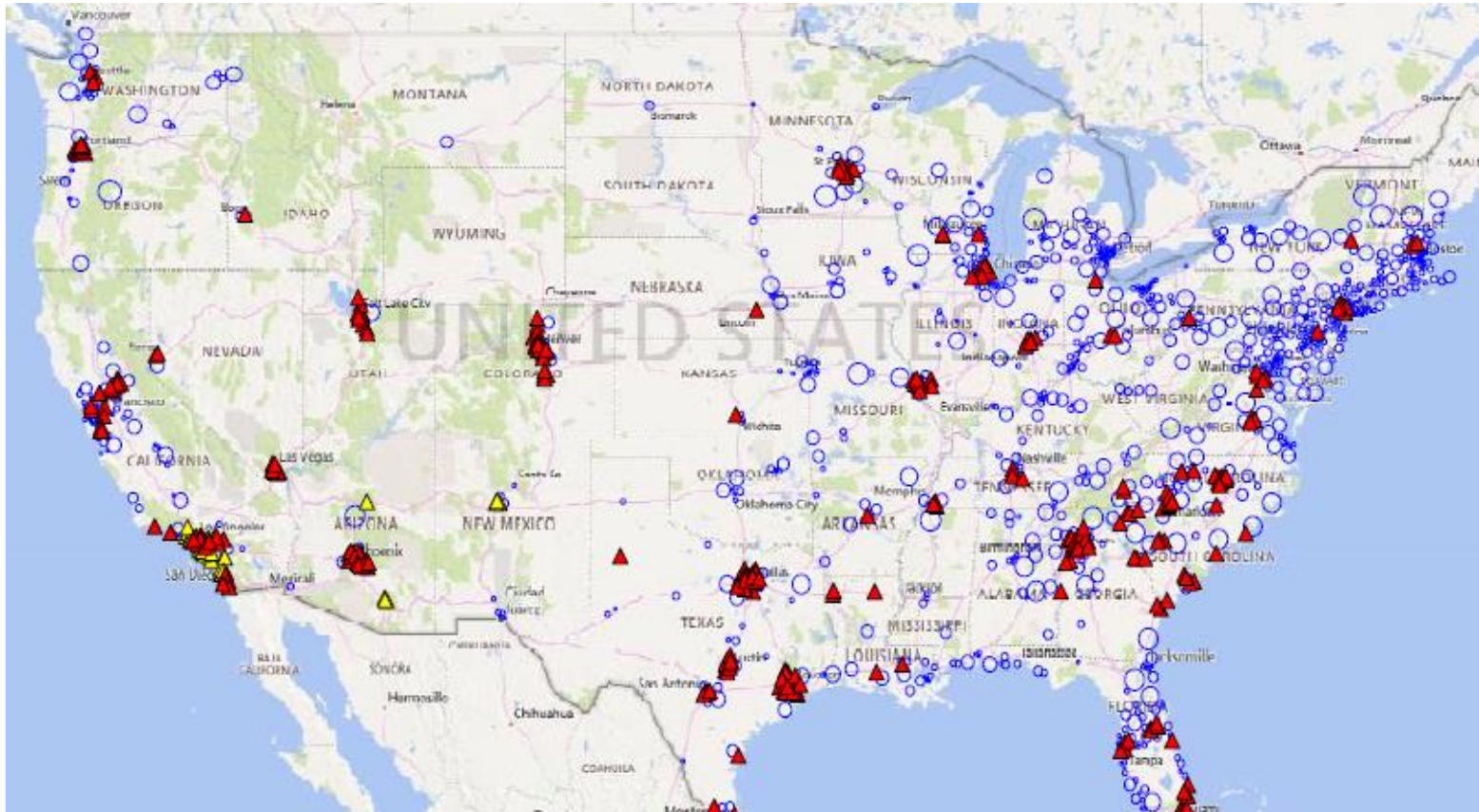


1265

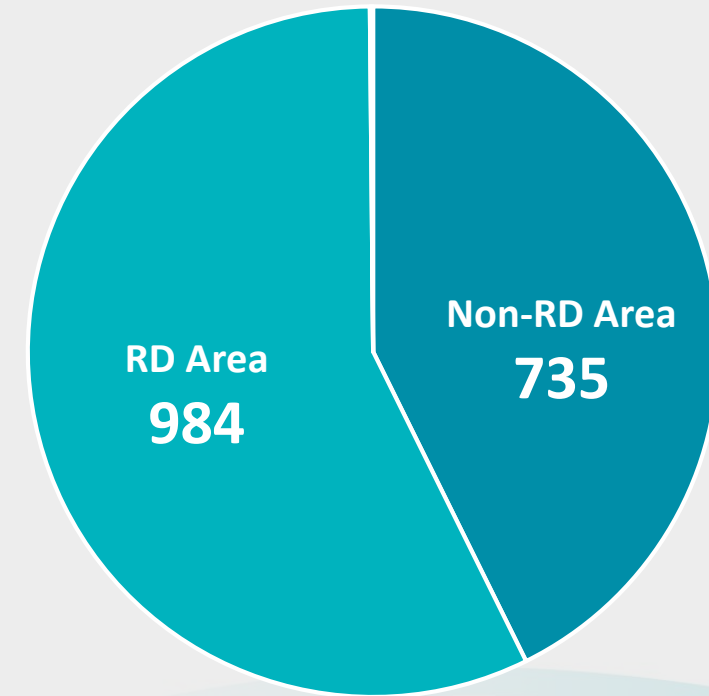


Maximum Buildout

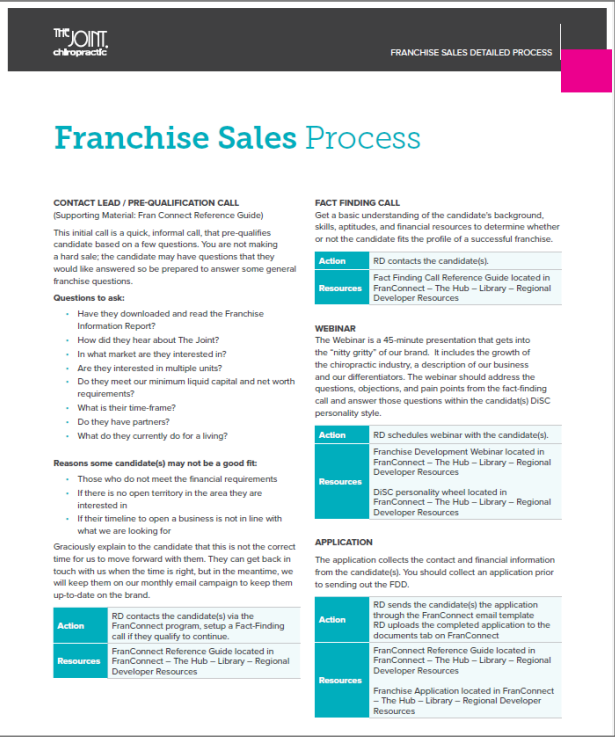
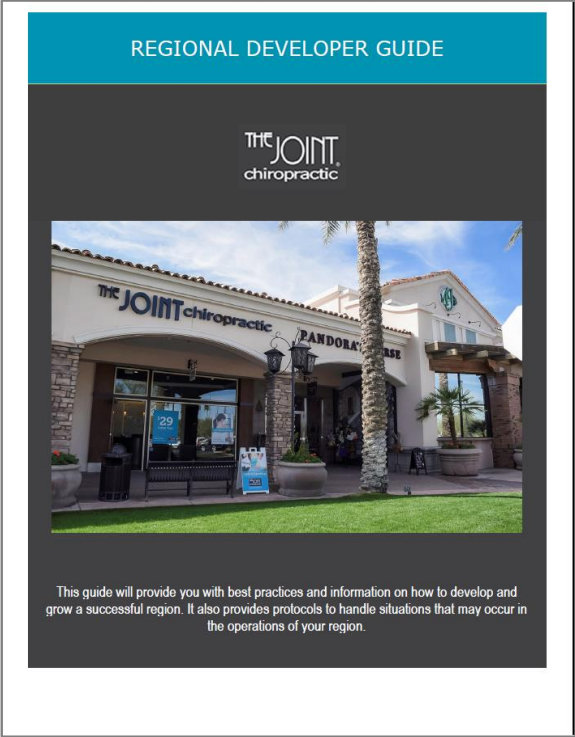
Based on current The Joint patient demographics & America's usage of chiropractic care



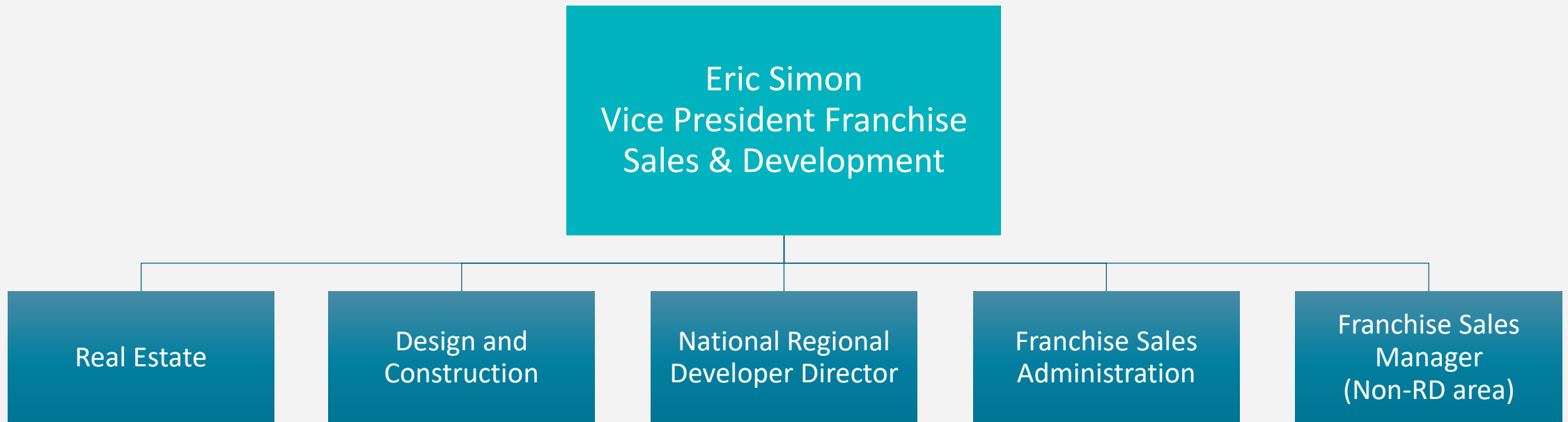
1719



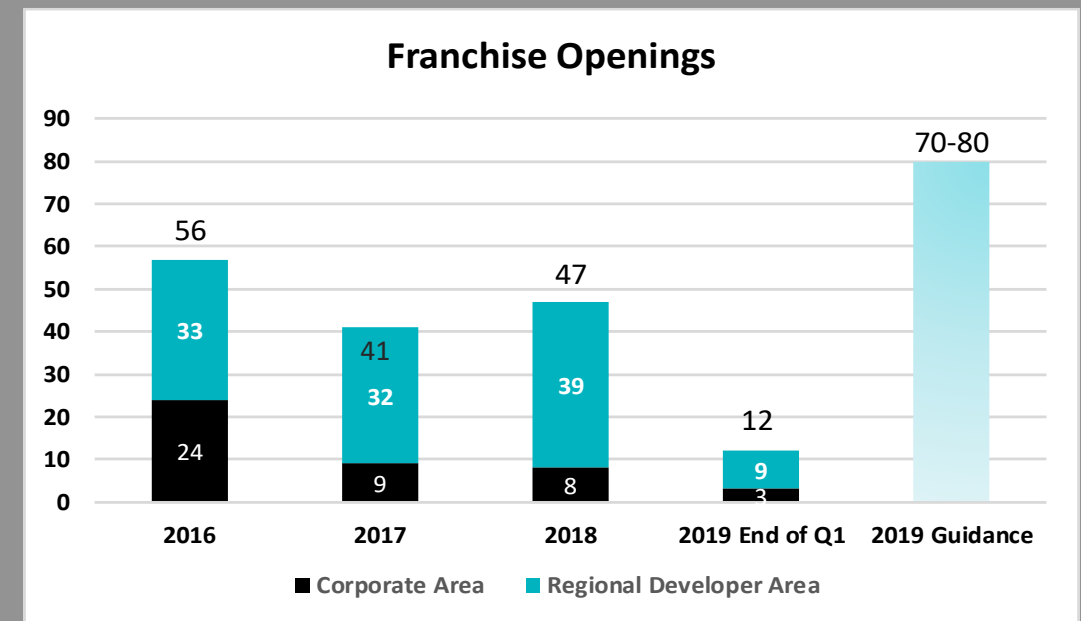
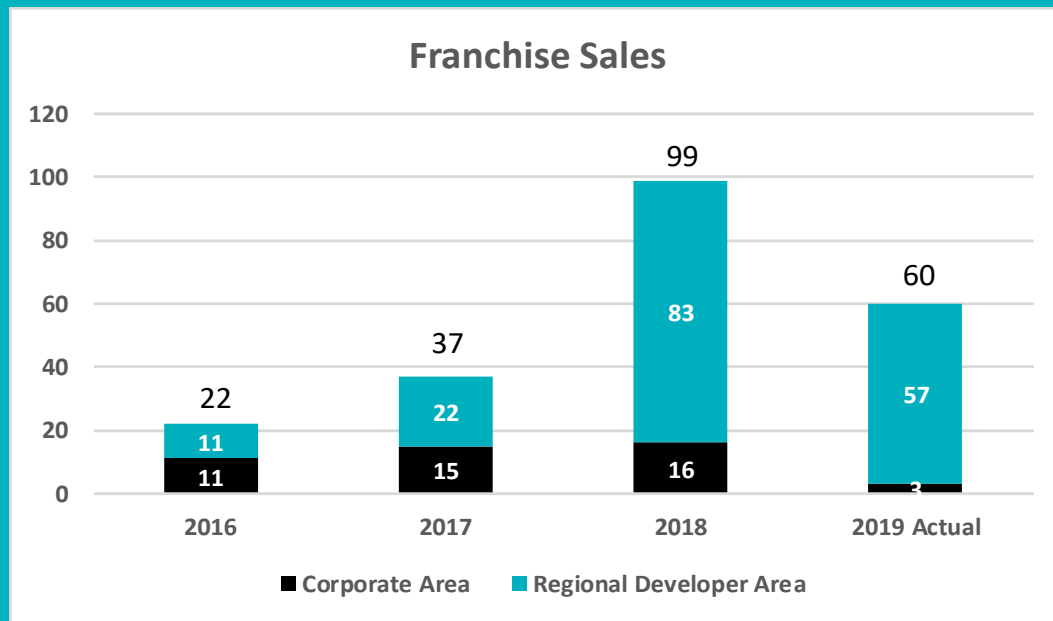
Regional Developer Support



Franchise Development Department



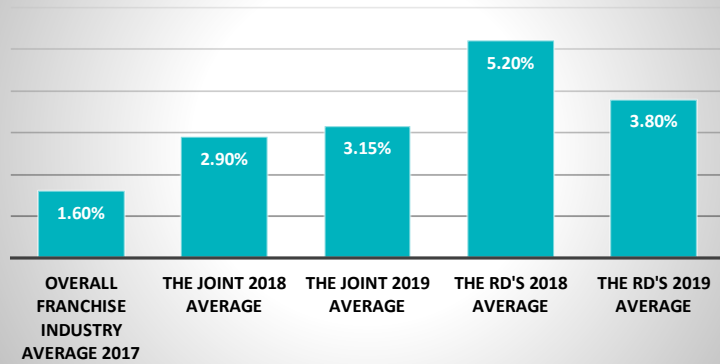
Brand Growth: Franchise Sales & Opening Results



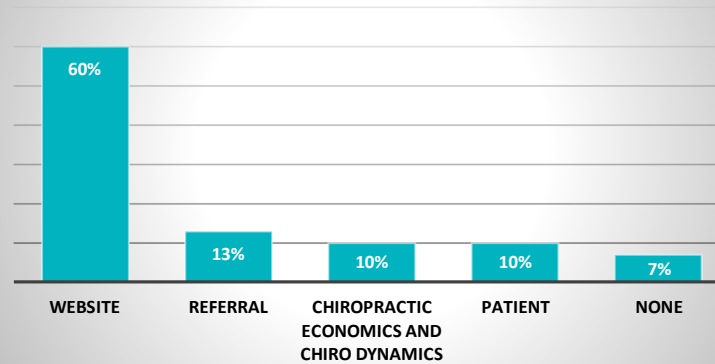
172 Franchise Agreements and Letters of Intent, Signed and in Various Stages of Development

Franchise Sales Stats

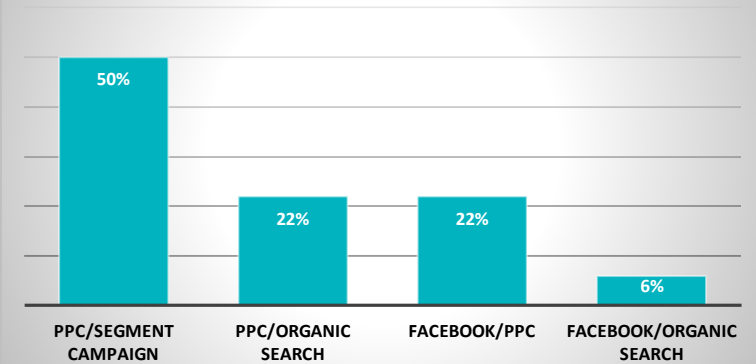
Lead To Deal Percentage



The Joint Deals By Source



2019 Joint's Website Deals by Source



Cost and Timing

Cost Per Lead	Amount
Franchise Industry 2018	\$126
The Joint 2018	\$137
The Joint 2019	\$108
Cost Per Deal	Amount
Franchise Industry 2018	\$8,984
The Joint 2018	\$6,265
The Joint 2019	\$3,887
Timing	Median
Lead to Sale	152 days (median)
Franchise Agreement to Open	8 months (median)

Beyond 1700



Initiatives for Future Growth



Rural Model



Super Urban Model

Apprenticeship & Mentorship Leads to Partnership

DC Path to Ownership Program

Goal

- The Joint Corp. will maintain its leadership within the chiropractic industry by assisting DCs in owning their own practice through our franchise model.

Objective

- Provide a platform for our franchisees and the CSC to employ, retain and grow with qualified DCs who believe in The Joint concept and brand
- Give our doctors the opportunity to become The Joint Chiropractic owners under the guidance and partnership of our franchisees
- Promote The Joint Corp. within the academic community as the leader in providing DCs employment and business ownership opportunities

Dual Concept: Relax The Back

Located in Burlington, MA

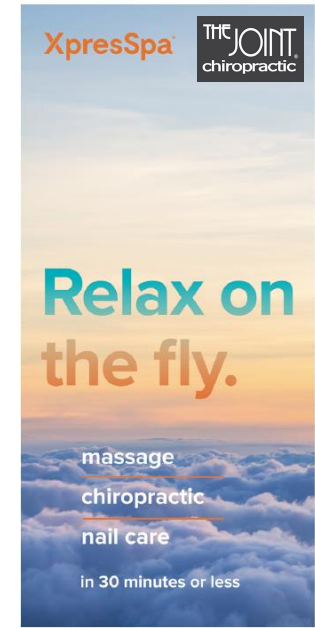


Dual Concept: XpresSpa

First airport location
coming soon to Austin, TX



Window Wrap



Wall Poster

Key Takeaways

1. **Regional Developer strategy works**
2. **Our sales processes, training and support for our Regional Developers is working**
 - We are outperforming the franchise industry in lead to sale conversion
 - The most important franchise sales KPI
3. **We continue to identify and test new opportunities to go beyond the 1700 clinic count**

Questions?



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Real Estate Site Selection & Strategy

Richard Matthews, Director of Real Estate Research

My Background

Richard Matthews

Education

BS: Mathematics



MA: Geography

PhD: Geography (Economic Geography)



Business Experience



UNIVERSITY OF
SOUTH CAROLINA

PET SMART

Marcus &
Millichap

Agenda

1

Goals

2

Models/Tools

3

Deployment

4

**Location
Criteria**

5

**Site
Acceptance
Process**

6

**New
Markets**

The Joint Real Estate Team

Team Goals

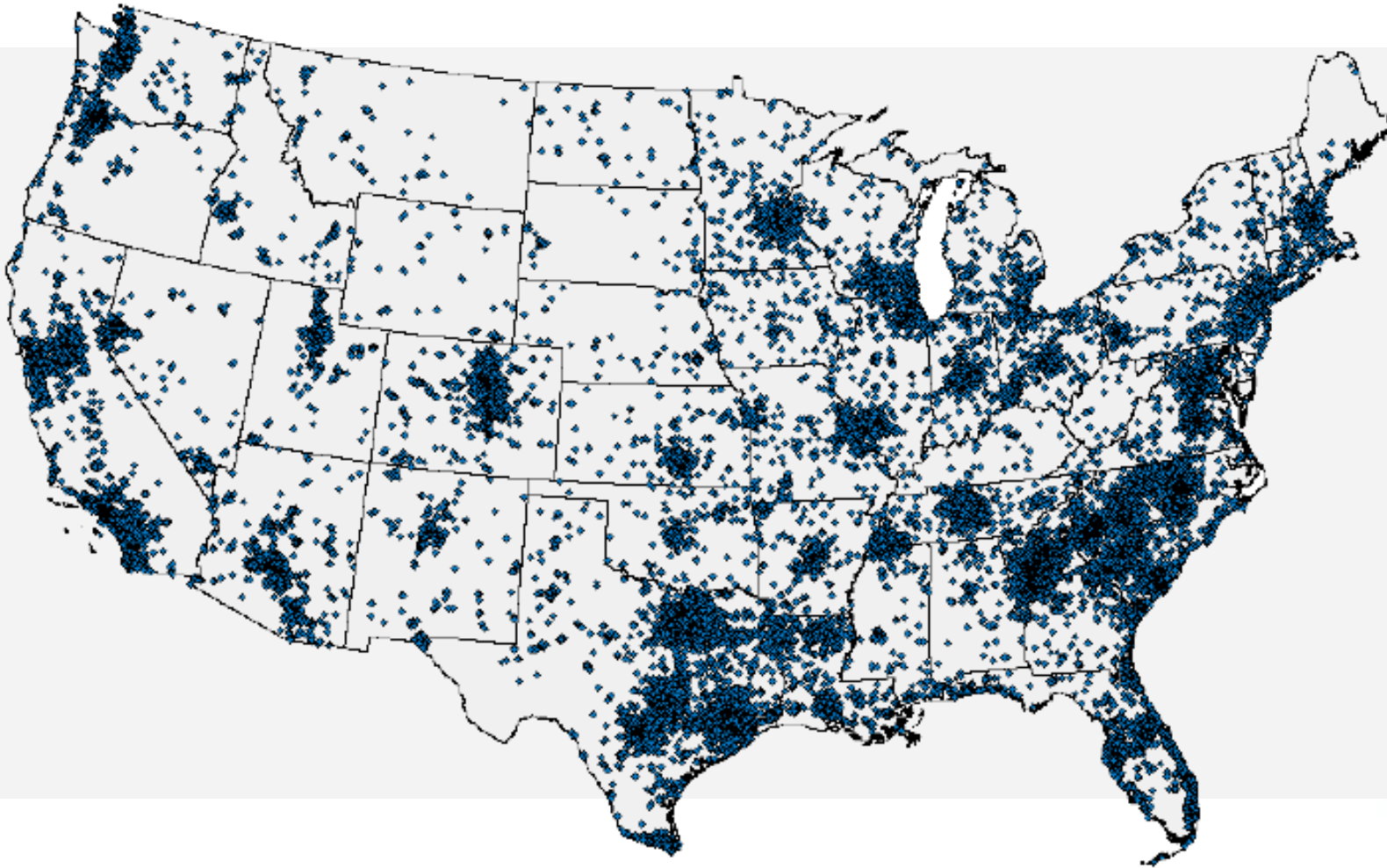
- Organize and describe real estate data: patient behavior, trade area dynamics, best centers and sites
- Build explanatory models and develop strategy
- Communicate results and best practices to RDs/Franchisees
- Work with Franchisees on clinic openings via site evaluation
- In short: understand the importance of site and apply those learnings to new centers

How do we
determine
customers and
trade areas?

Patient Identification

- Plotted 557,000 patient locations from 430 units in 31 states across the country
- Assigned each patient to a Zip + 4 location and sorted by demographics and psychographics
- Measured distance and drive time from the Zip + 4 site to each clinic
- Identified core customers and solved for penetration rate
- Solved for required population to achieve minimum threshold of core customers

Patient Distribution

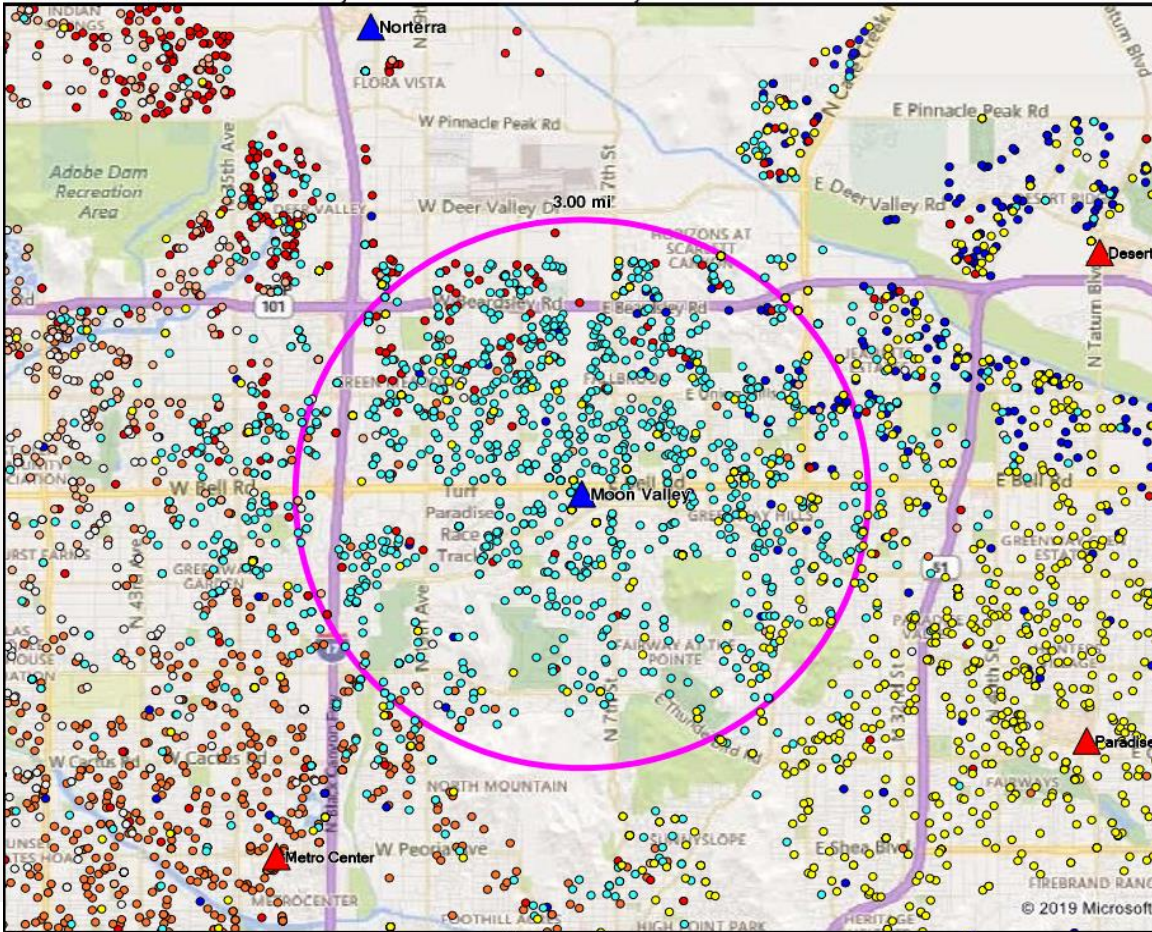


557,000 Patients

With usable addresses from 2018

- All 50 States, DC, and Puerto Rico
- All Canadian Provinces and Territories
- 24 Countries on 6 Continents

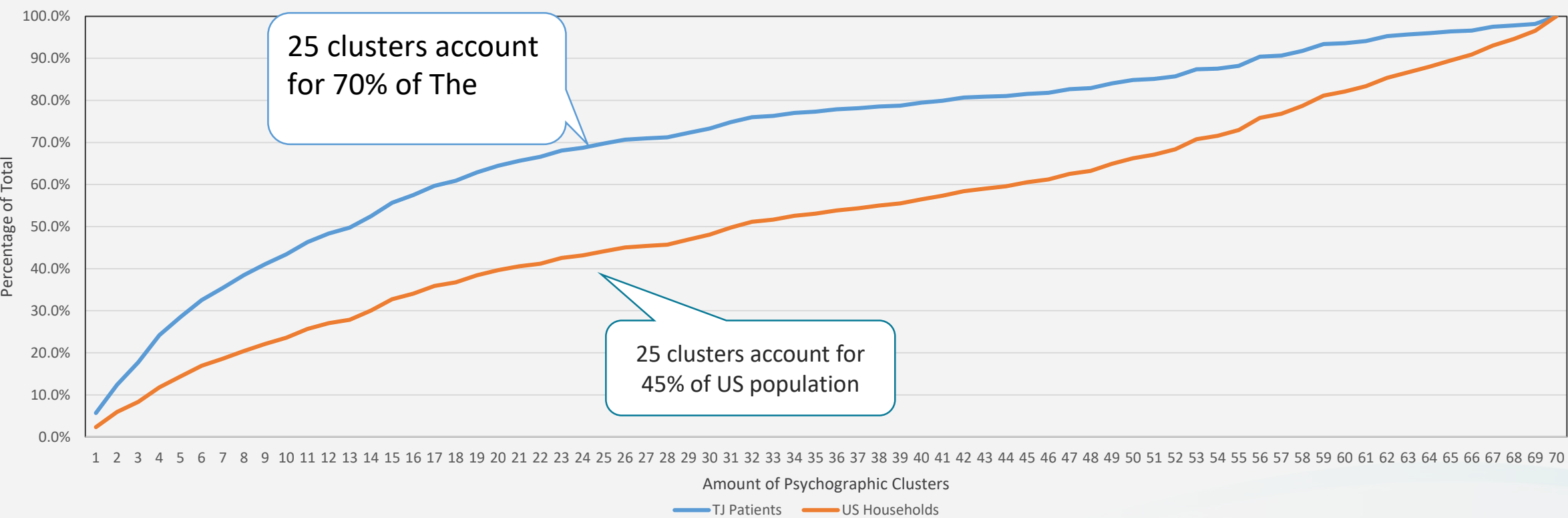
Patient Distribution by Clinic



- Patient travel patterns
- Barriers to interaction
- Composition of trade areas
- 400 demographic, psychographic, and site characteristics for each clinic
- Regress clinic performance against trade area factors

Patient Identification

Psychographics of The Joint Patients vs U.S. Households

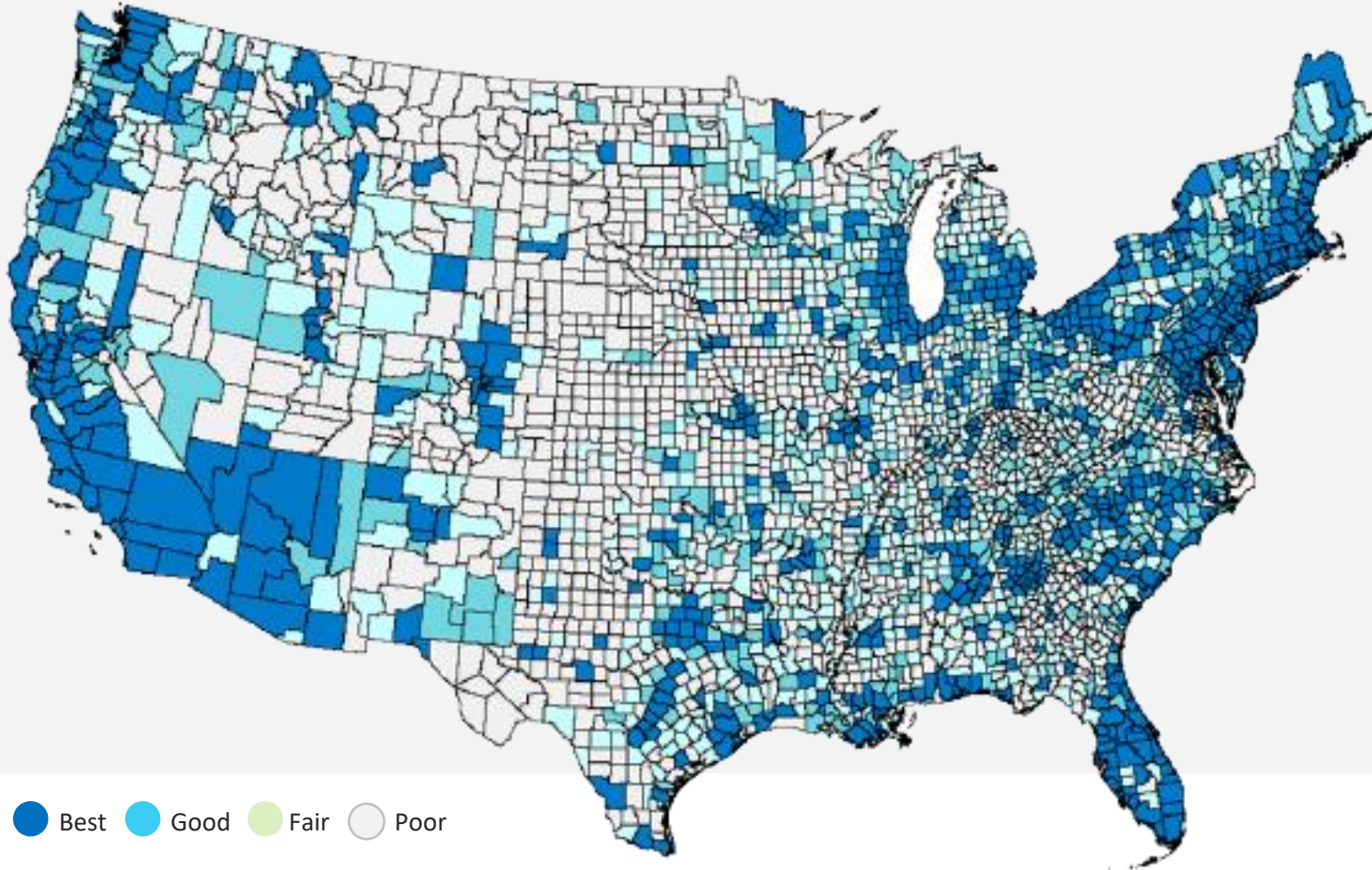


Patient Identification

Who Are Our Customers?

Wide Age Range	Wide Economic Spectrum	Wide Urbanicity Range	Large Trade Area Database
Millennials: 39%	White Collar	Cities	452 Clinics
Generation X: 34%	Blue Collar	Suburbs	400 Variables
Baby Boomers	Median Household Income Range: \$50k - \$100k	Towns	

National Buildout Potential



Data Analytics Yields
1700+ Clinics

- Projected Core Customer and Trade Area Potential
- Based on current usage patterns

Curated Site Selection

Demographic and Location-specific Learnings

Be Where The People Are

Three Real Estate Pillars

- Trade Area Demographics
- Composition of Center
- Location within Center

Density Wins

- Avoid thinly populated areas
- Clustering clinics helps build brand

Income Range Matters

- Median household income range: \$50k - \$100k
- Will go above or below income range if desirable density or other factors exist

Curated Site Selection

Demographic and Location-specific Learnings

Daytime Workforce Population Helps

- Employment builds on residential base
- Impacts of all-workforce no-residential is unclear

Convenience is Critical

- Part of patients' daily activity space
- Centers where most people appear the most often

Best-in-Class Site Characteristics

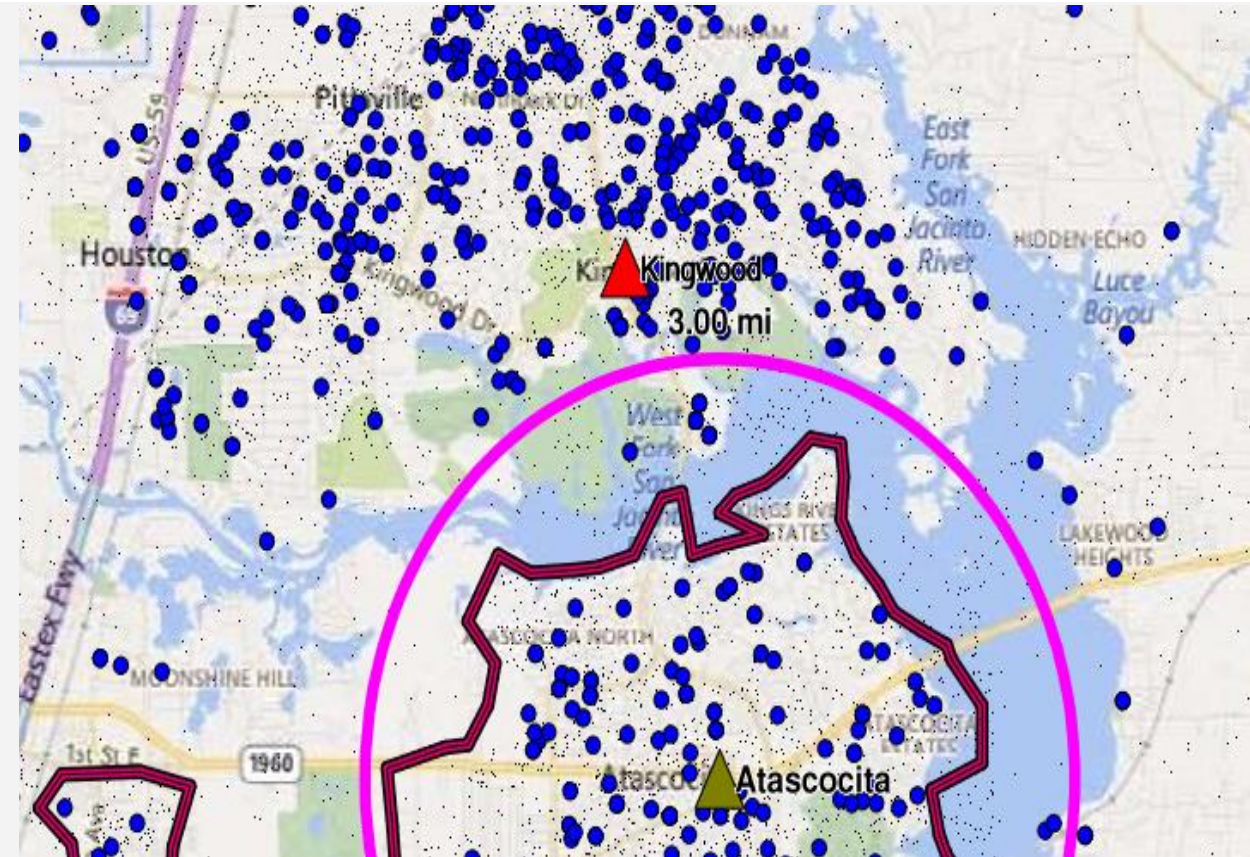
- Visible and accessible
- Daily drivers
 - Top-tier grocers
 - Multiple restaurant options
 - Health care/beauty tenants
- “Mini-Regional” mid-box uses add to traffic mix
- Home stores; soft goods, pet supplies



Smart Growth

We have established an Encroachment Policy to ensure franchisee protection

- 62 instances of new clinics opening within 5 miles of an existing clinic since January 2015
- Average revenue increase: 13.0% in six months
- New clinics average 50% above historical ramps



Site Acceptance Committee

Weekly Meeting
To Review &
Evaluate New
Sites For Clinic
Development

Purpose

- Provide due diligence from multiple frameworks
- Accelerate clinic opening process

Committee Membership

- Senior Team Members
- Real Estate
- Regional Developer as point of contact

Results

- 88% of new clinics are above average
- New clinics are 104% above historical ramps

Expansion: New Markets

Small Markets

- Recent openings help us understand growth potential

Urban

- Pedestrian focus
- Very few now; will be important

Non-traditional

- Airports, dual concepts, and/or universities

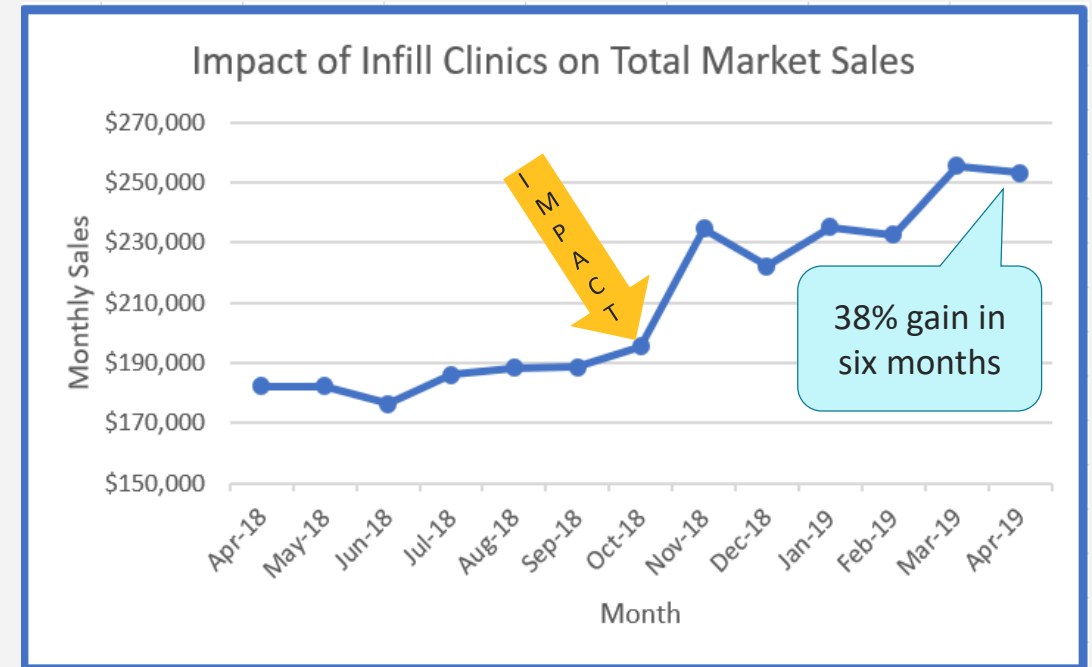
Potential Growth Source: Infill

Two top tier clinics with planned expansion

- Six months prior to New Clinics: \$184,521
- Six months after New Clinics: \$254,286

Determining a strong clinic expansion strategy

- Top 50 clinic revenues are 87% above chain average
- Top 50 clinics average 24% YOY comp sales



Key Takeaways

1. **Core customers come from a broad spectrum of demographic and psychographic types affording us a deployment plan across a variety of locational settings**
2. **Sales forecasting tools and buildout potential based on highly reliable and proprietary analytics**
 - Current database uses 400 predictive variables for each clinic trade area
 - Model and data are used in other departments in the business
 - Finance • Marketing • Operations
3. **Optimize growth based on expanding brand and industry awareness**
 - Our patients tell us who they are and how they act
 - We search for analogous populations

Questions?

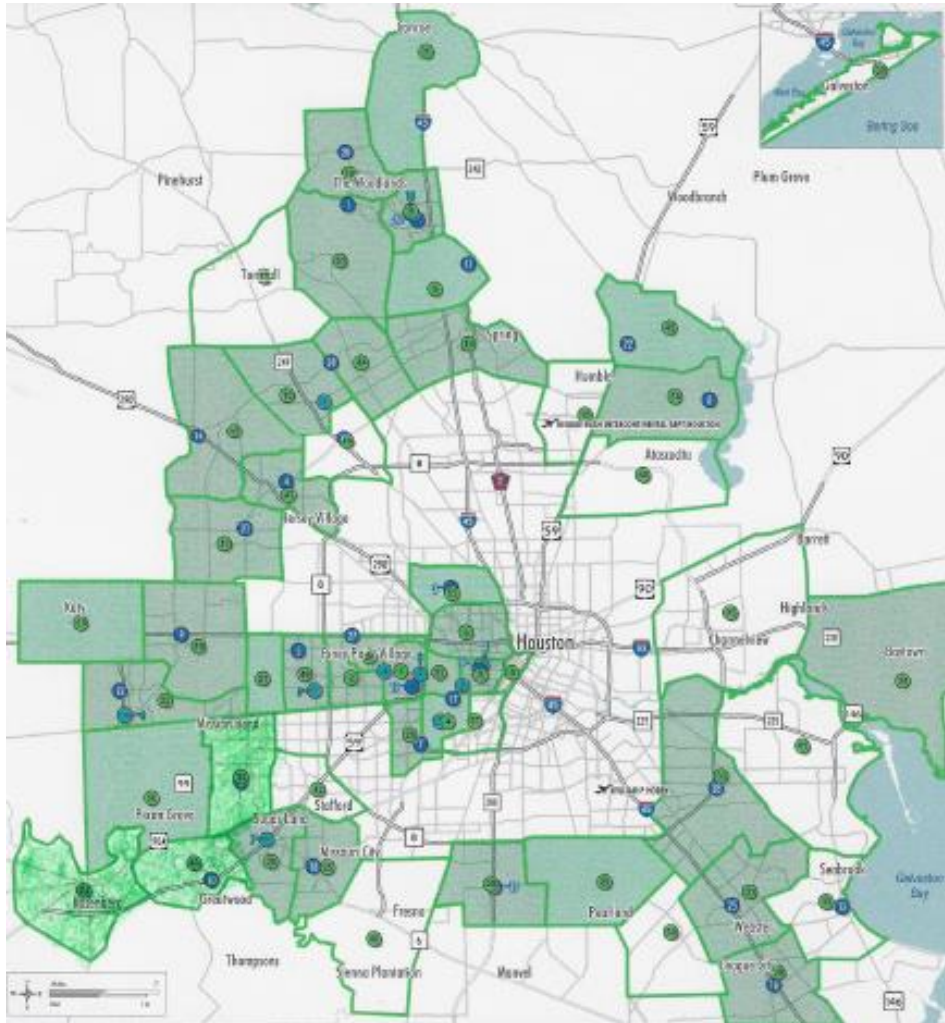


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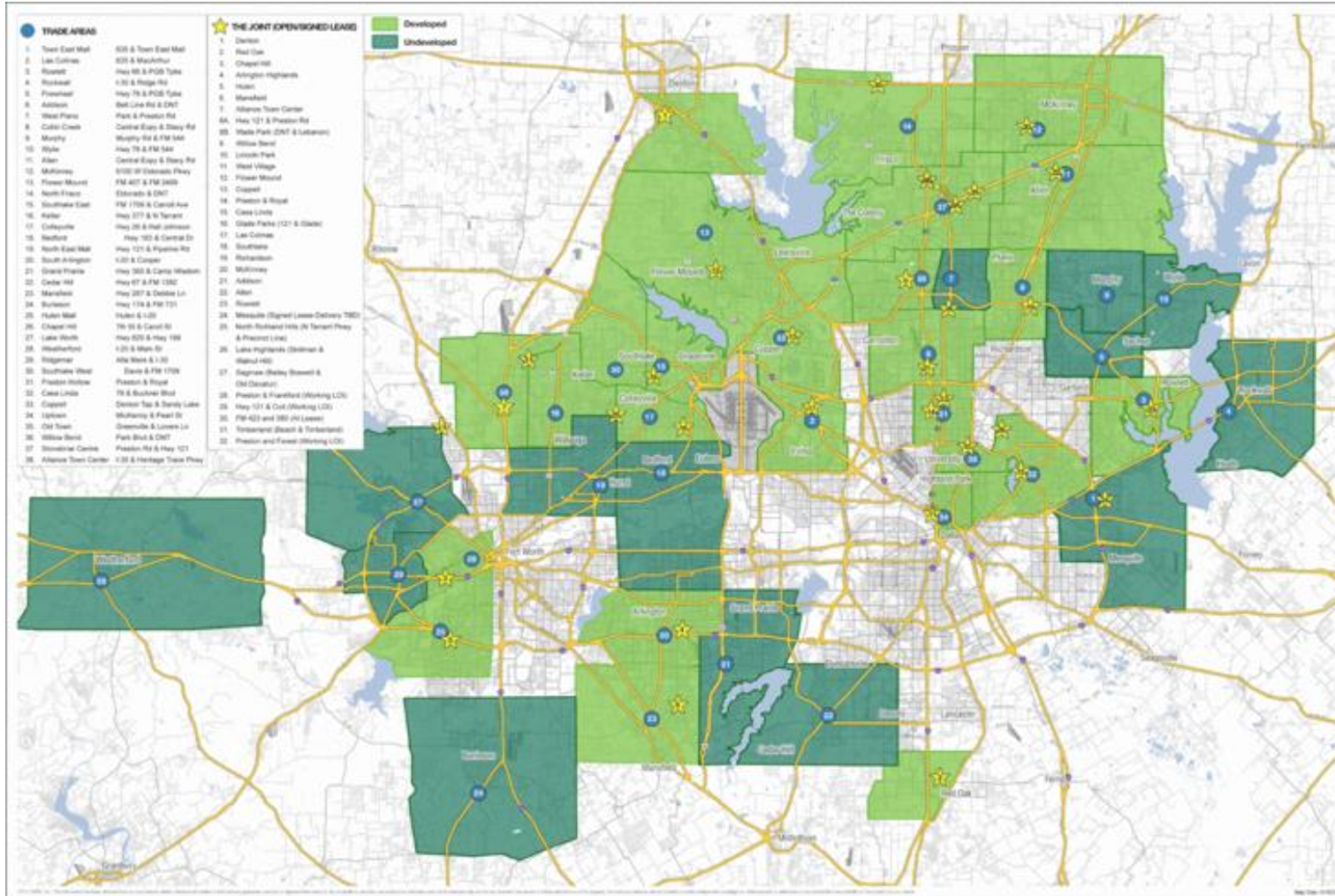
Regional Developer
David Glover, Texas Regional Developer

Projected Houston Trade Areas 03.06.18

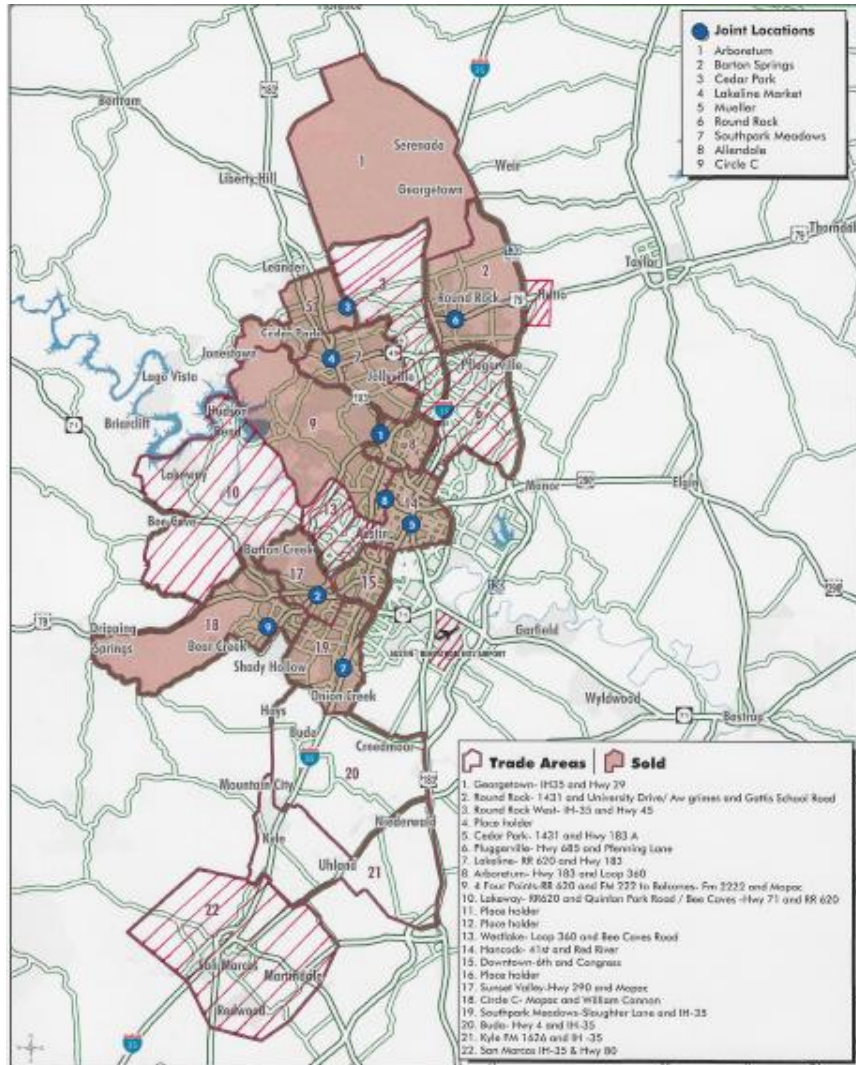


Trade Areas	Trade Areas - AWARDED	Massage Frms	Whole Foods
1. Bitter - Westwood & Foster Rd - AWARDED	27. 1. Cullen - Old Spanish Trail & Hwy	1. The Woodlands - Indian Springs	1. Houston - 7911 W. Loop W. - Houston
2. Westwood - Westwood & Foster - AWARDED	28. Pearland - Hwy 289 & I-10 - AWARDED	2. Houston - 7911 W. Loop W. - Houston	2. City - 7911 W. Loop W. - Houston
3. River Oaks - West Loop & West Loop - AWARDED	29. Spring Branch - Spring Branch - AWARDED	3. Houston - 7911 W. Loop W. - Houston	3. Pearland - 11000 Fwy 281 - Houston
4. West Woodlands - Westwood & Foster - AWARDED	30. League City - I-45 & I-10 - AWARDED	4. Houston - 7911 W. Loop W. - Houston	4. Houston - 7911 W. Loop W. - Houston
5. I-10 - West Loop - AWARDED	31. Houston - I-45 & I-10 - AWARDED	5. Houston - 7911 W. Loop W. - Houston	5. Houston - 7911 W. Loop W. - Houston
6. Houston - I-10 & I-45 - AWARDED	32. Houston - I-45 & I-10 - AWARDED	6. Houston - 7911 W. Loop W. - Houston	6. Houston - 7911 W. Loop W. - Houston
7. Houston - I-45 & I-10 - AWARDED	33. Houston - I-45 & I-10 - AWARDED	7. Houston - 7911 W. Loop W. - Houston	7. Houston - 7911 W. Loop W. - Houston
8. Houston - I-45 & I-10 - AWARDED	34. Houston - I-45 & I-10 - AWARDED	8. Houston - 7911 W. Loop W. - Houston	8. Houston - 7911 W. Loop W. - Houston
9. Houston - I-45 & I-10 - AWARDED	35. Houston - I-45 & I-10 - AWARDED	9. Houston - 7911 W. Loop W. - Houston	9. Houston - 7911 W. Loop W. - Houston
10. Houston - I-45 & I-10 - AWARDED	36. Houston - I-45 & I-10 - AWARDED	10. Houston - 7911 W. Loop W. - Houston	10. Houston - 7911 W. Loop W. - Houston
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16. Houston - I-45 & I-10 - AWARDED	42. Houston - I-45 & I-10 - AWARDED	16. Houston - 7911 W. Loop W. - Houston	16. Houston - 7911 W. Loop W. - Houston
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19. Houston - I-45 & I-10 - AWARDED	45. Houston - I-45 & I-10 - AWARDED	19. Houston - 7911 W. Loop W. - Houston	19. Houston - 7911 W. Loop W. - Houston
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22. Houston - I-45 & I-10 - AWARDED	48. Houston - I-45 & I-10 - AWARDED	22. Houston - 7911 W. Loop W. - Houston	22. Houston - 7911 W. Loop W. - Houston
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24. Houston - I-45 & I-10 - AWARDED	50. Houston - I-45 & I-10 - AWARDED	24. Houston - 7911 W. Loop W. - Houston	24. Houston - 7911 W. Loop W. - Houston
25. Houston - I-45 & I-10 - AWARDED	51. Houston - I-45 & I-10 - AWARDED	25. Houston - 7911 W. Loop W. - Houston	25. Houston - 7911 W. Loop W. - Houston
26. Houston - I-45 & I-10 - AWARDED	52. Houston - I-45 & I-10 - AWARDED	26. Houston - 7911 W. Loop W. - Houston	26. Houston - 7911 W. Loop W. - Houston

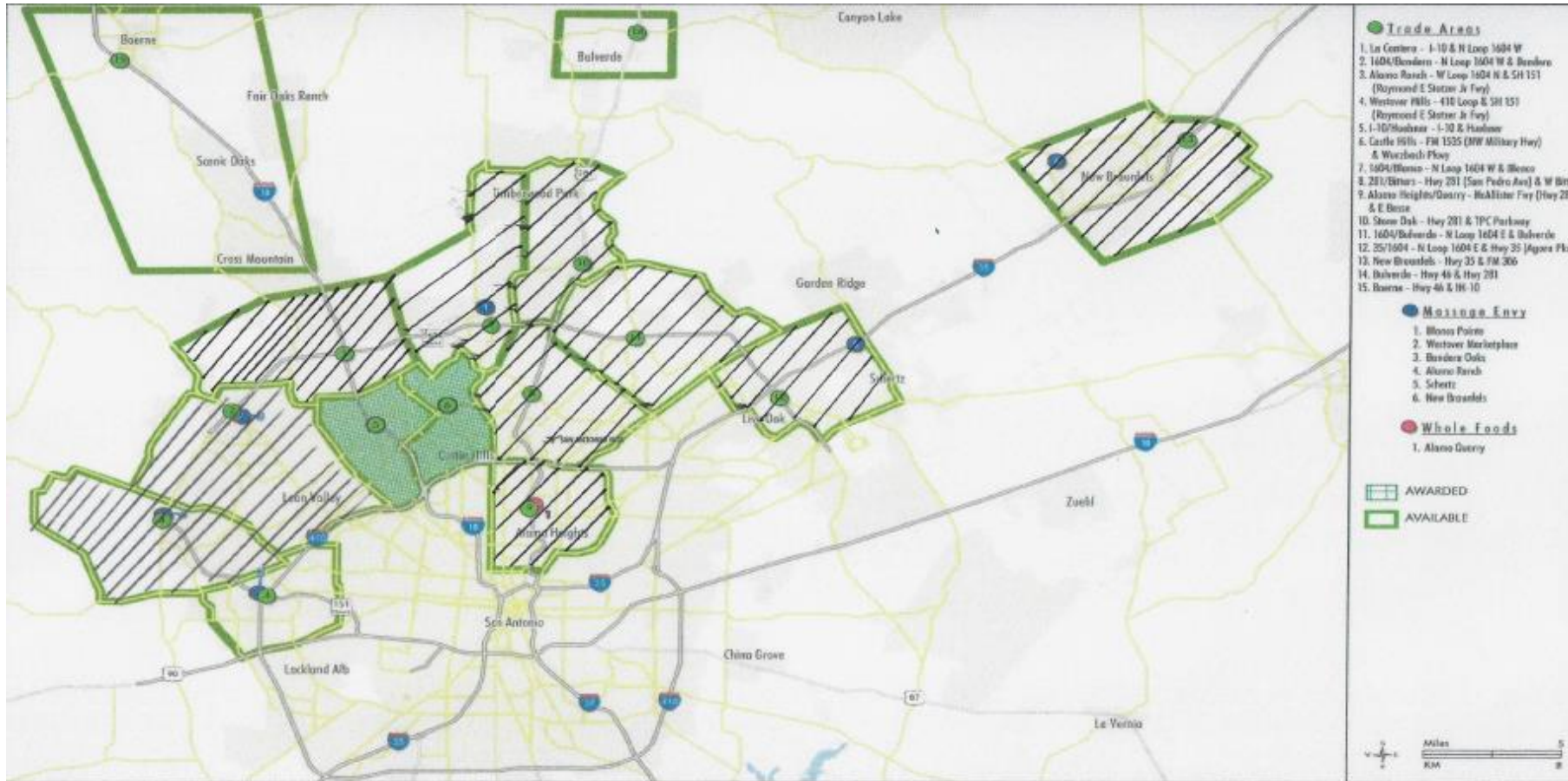
Dallas/Fort Worth DFW Coverage



Projected Austin Trade Areas 04.19.16



Projected San Antonio Trade Areas



Curated Site Selection



**WE'VE GOT
#TOWN'S
BACK**

**THE JOINT
chiropractic**

**UH OFFICIAL CHIROPRACTOR
HOUSTON ATHLETICS**

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NEW PATIENT SPECIAL

\$29^{*}

Consultation | Exam | Adjustment

No Appointments
No Insurance Needed
Open Evenings & Weekends

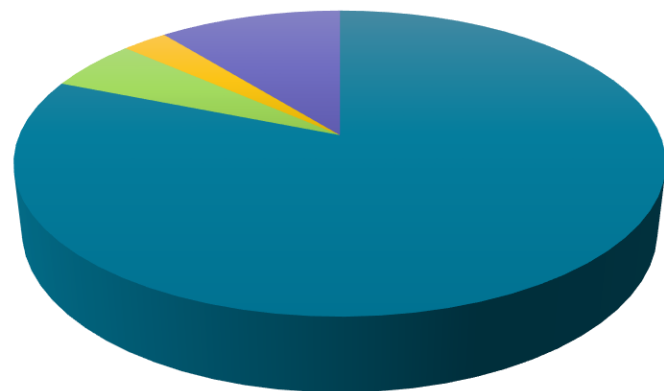
**THE JOINT
chiropractic**

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Texas Development Status

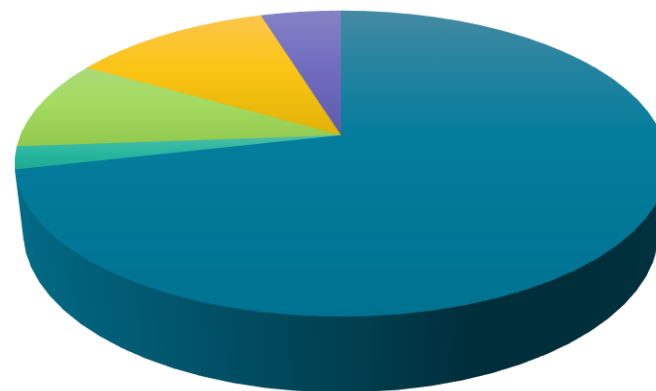
109 Licenses Sold

Houston (37 Licenses)



- Open (31)
- Construction (0)
- Lease Signed (2)
- Negotiations (1)
- RE Search (4)

Dallas-FT Worth (42 Licenses)

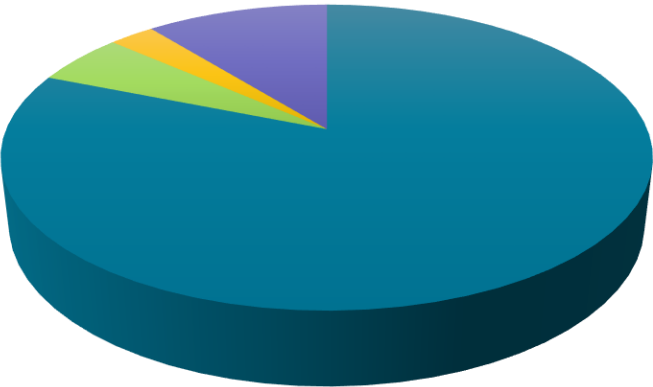


- Open (30)
- Construction (1)
- Lease Signed (4)
- Negotiations (5)
- RE Search (2)

Texas Development Status

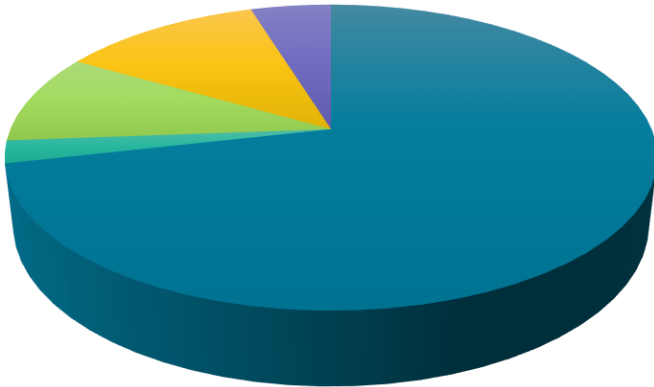
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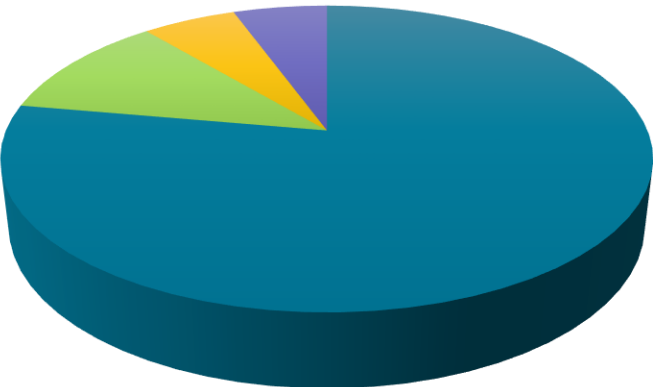
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- RE Search (4)

Dallas-FT Worth (42 Licenses)



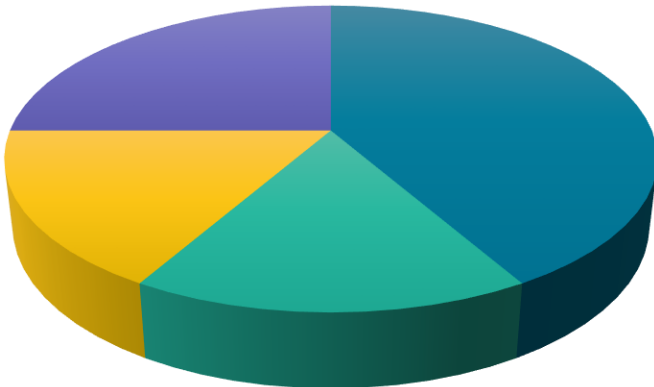
- Open (30)
- Construction (1)
- Lease Signed (4)
- Negotiations (5)
- RE Search (2)

Austin (18 Licenses)



- Open (14)
- Construction (0)
- Lease Signed (2)
- Negotiations (1)
- RE Search (1)

San Antonio (12 Licenses)



- Open (5)
- Construction (2)
- Lease Signed (0)
- Negotiations (2)
- RE Search (3)

Questions?




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Marketing & Patient Acquisition
Jason Greenwood, VP of Marketing

My Background Jason Greenwood

Education	Business Experience
<ul style="list-style-type: none">• BBA, Marketing• MBA, International Business	<ul style="list-style-type: none">• 20+ years of strategic marketing experience in restaurants and automotive• 5 years as a multi-unit franchise owner and operator <div></div>

Marketing Focus



Why The Joint Chiropractic?



- **Proven, Disruptive Model:** Bringing quality, convenient, affordable chiropractic to retail; membership-based, walk-in, no-insurance franchise model
- **Market Opportunity:** \$90B spent on back pain annually, \$15B on chiropractic care; 1,700+ unit national footprint opportunity,
- **Category Leadership:** 26% patients new-to-chiropractic, 25% comparable sales growth
- **Growing Brand Awareness:** Over 1.8 million patients in our database
- **Test Kitchen:** 450+ of them!
- **Experienced Leadership Team:** Management with significant franchise experience; NFAB and Regional Developer community
- **Unprecedented Profession Support:** Pre- and post-opening, creative assets, digital programs
- **Marketing Toolkit:** Collection of best practices and “how to” step-by-step guides
- **Online Print and Fulfillment Partner:** Design and legal automation for creative and collateral
- **National Marketing Fund (NMF):** Overlays our local marketing efforts with national tools, programs and media buys

Brand Identity



TARGET CONSUMER

- Open-minded
- Lives disrupted by pain

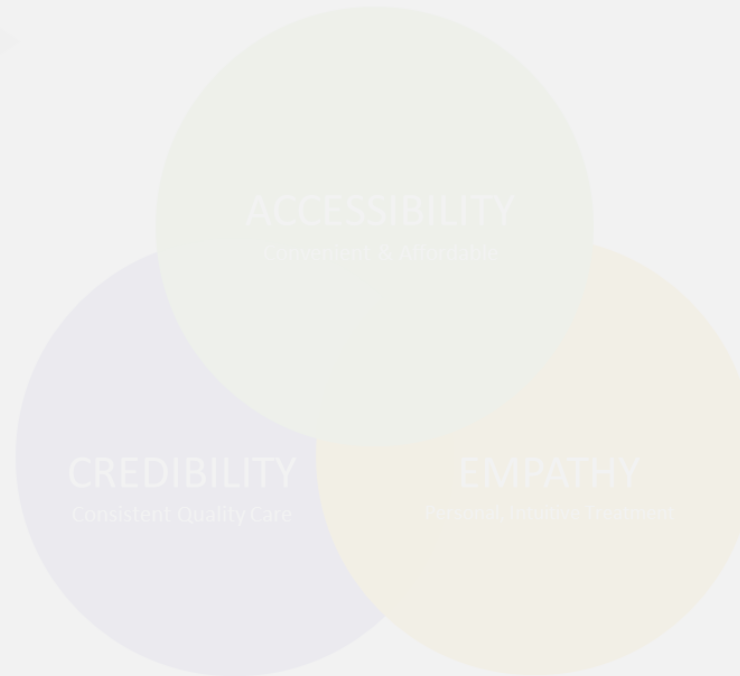
CURRENT MINDSET

- Status quo is unacceptable
- Need solutions fast
- Time and money are barriers



MARKETPLACE

- Not many easy answers to relief
- Open to a natural, drug-free approach
- Chiropractic could help, but often inconvenient and expensive



BRAND PERSONALITY

- Simple
- Sociable
- Knowledgeable
- Aspirational
- Vested



BRAND PROMISE

To improve quality of life through routine and affordable chiropractic care.

Brand Identity



TARGET CONSUMER

- Open-minded
- Lives disrupted by pain

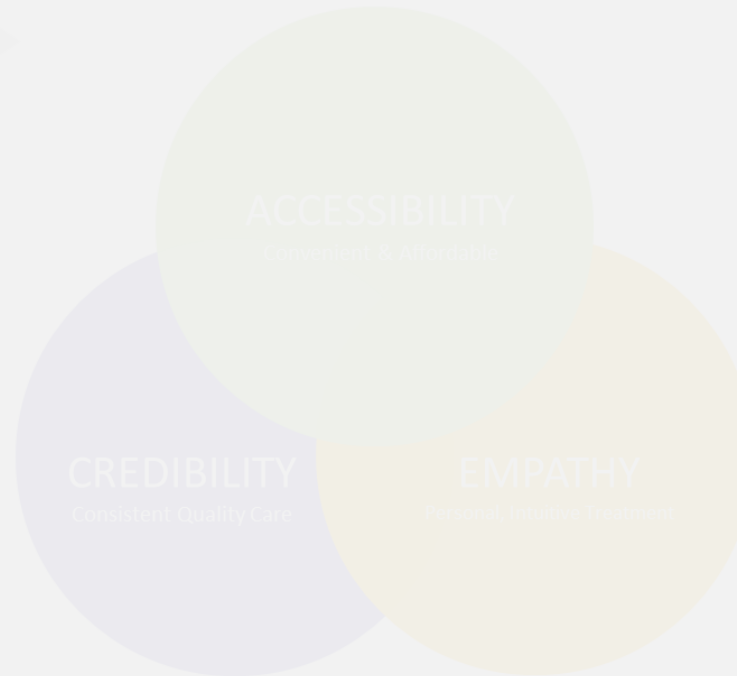
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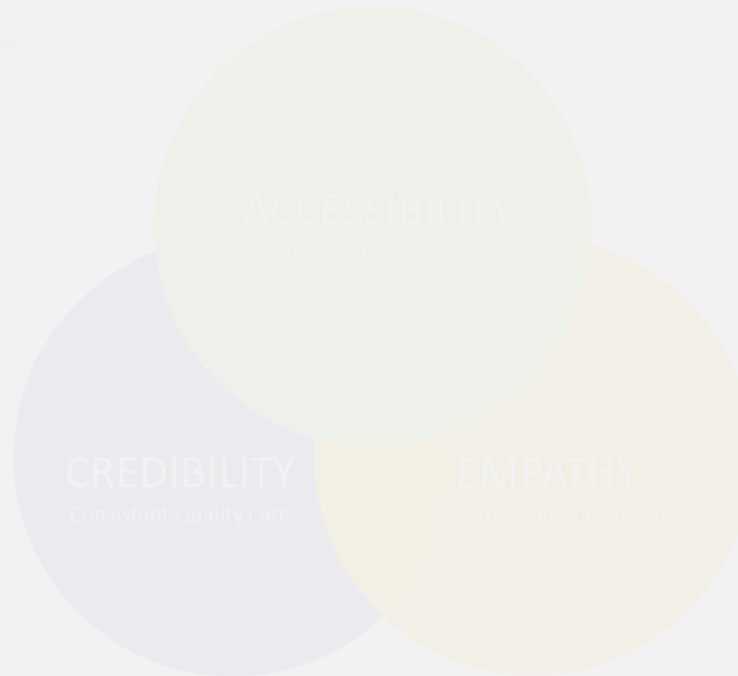
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chiropractic

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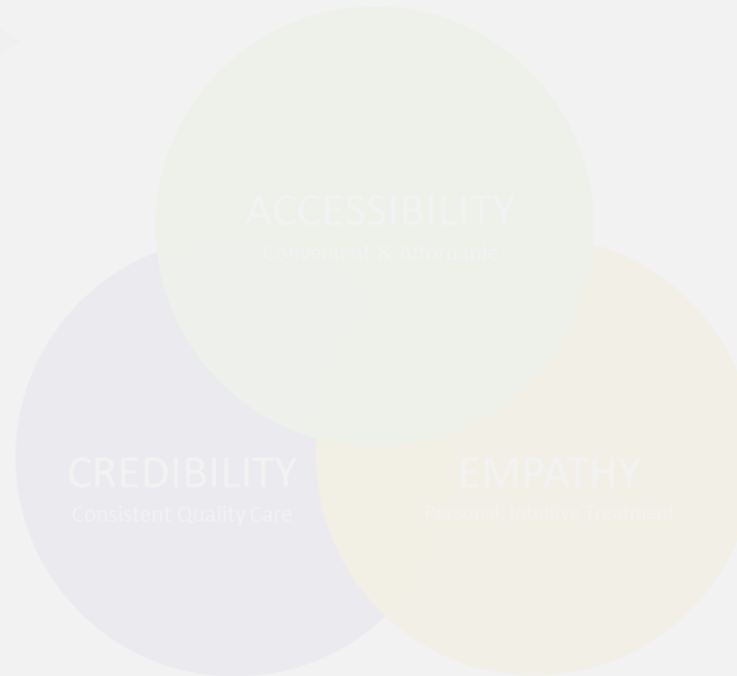
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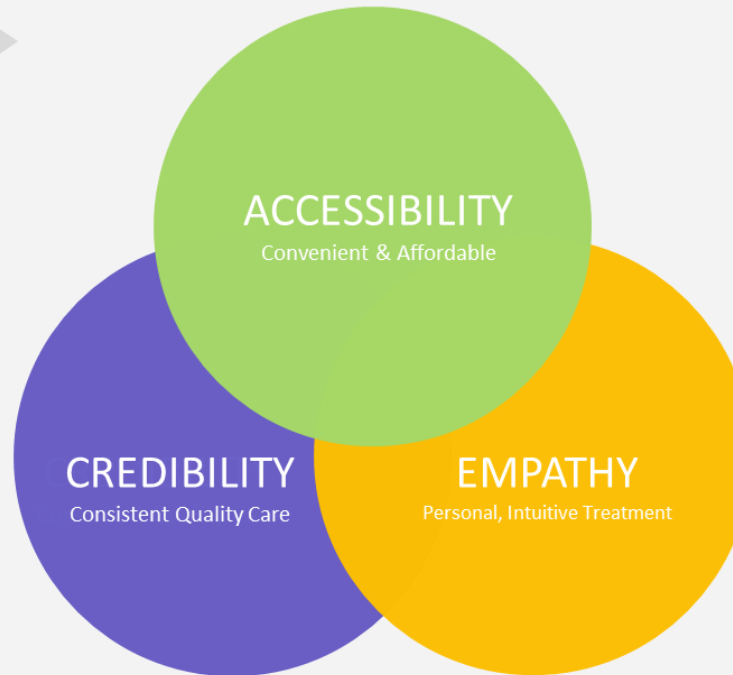
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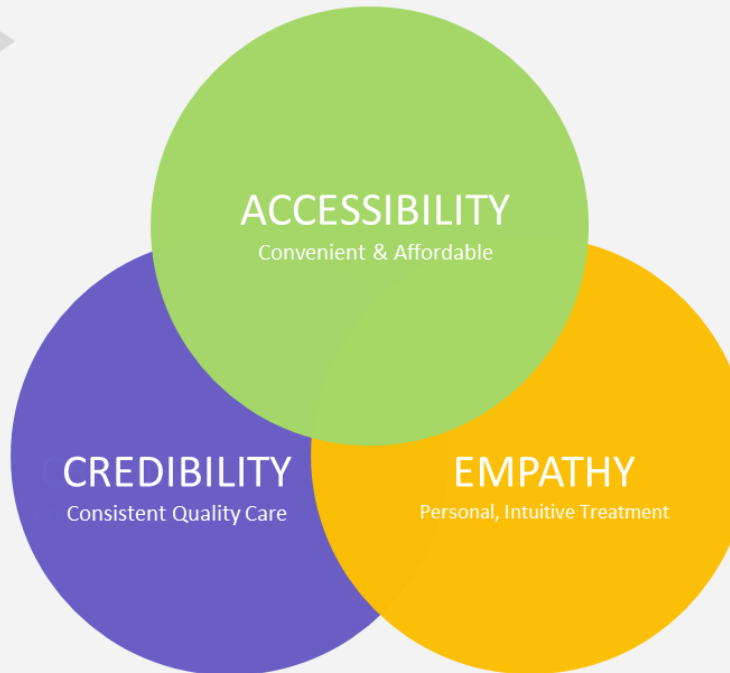
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MARKETPLACE

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Live a Better You



BRAND PERSONALITY

- Simple
- Sociable
- Knowledgeable
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- Vested

THE JOINT.
chiropractic

BRAND PROMISE

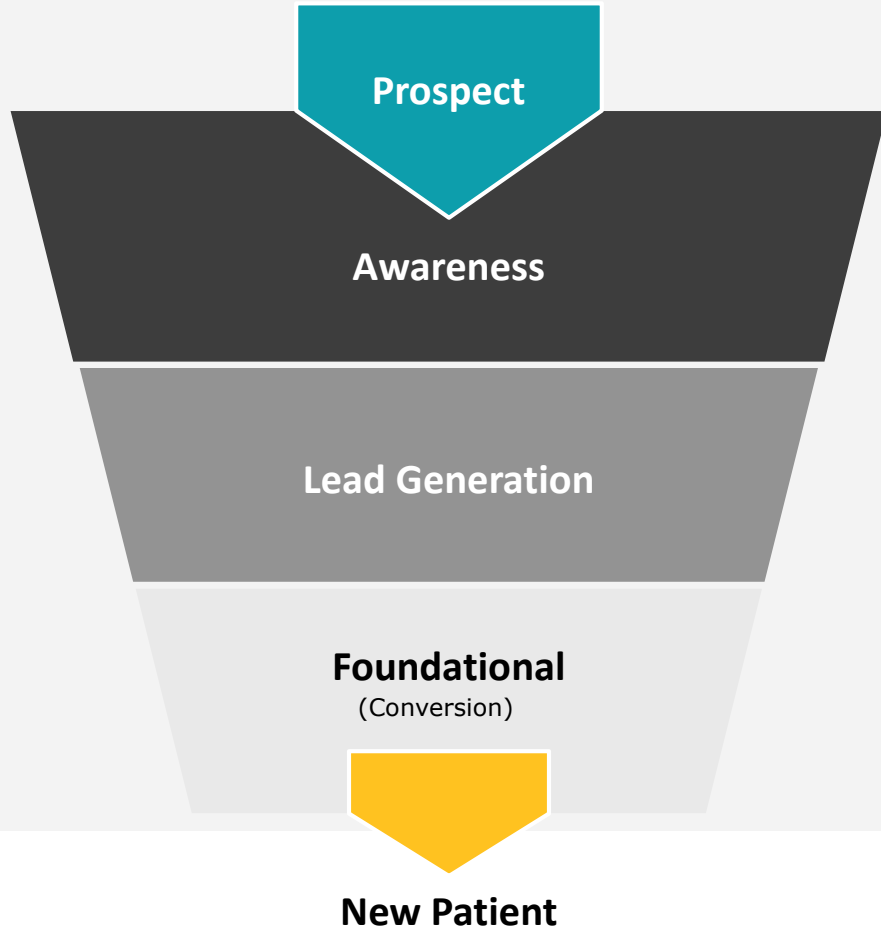
To improve quality of life through routine and affordable chiropractic care.

New Patients a Lifeblood

- Significant area of focus and a key metric
- Three general sources, according to Atlas patient data in 2019:
 - **Referrals, 36%** – tied to strong patient experience
 - **Digital Marketing, 33%** – refined programs for franchisee participation
 - **Local Store Marketing, 31%** – from signage to community engagement to traditional advertising, executed locally
- Refined methodology to encourage greater franchisee marketing investment and accelerate new patient growth

Attracting New Patients

The Joint's Marketing Methodology or "Purchase Funnel"



Audiences

- Largest audience; may or may not have heard of The Joint or be in market for chiropractic
- Refined audience; actively seeking pain relief or wellness solutions (or resemble those who are)
- Smallest audience; easiest and cheapest to convert; many actively seeking a chiropractor and can be closed with the right information

Foundational Marketing

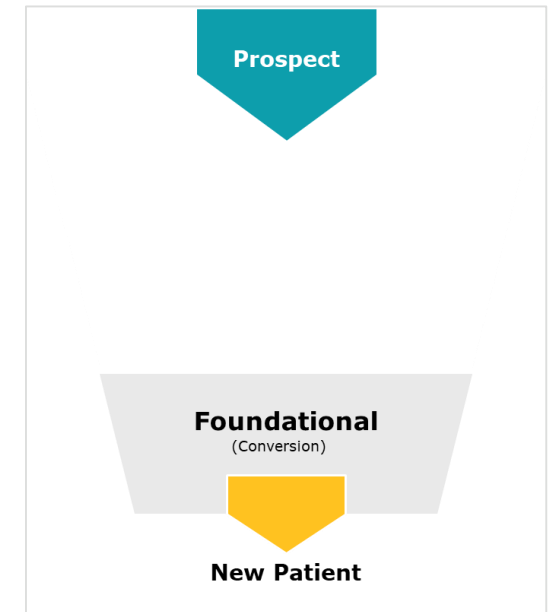
Tactics that establish visibility, trust and credibility of clinics and staff; effort here makes all other advertising more efficient, at minimal cost

SEO: Increasing visibility through organic search and social media

- Refers to unpaid results from a user queries on search engines
- Funded by NMF, facilitated by outside digital agency
- Activities include on-page SEO, business citations, review/reputation management, national/local blog content, local social media content and link building

Community Marketing: Engaging in shopping center/local trade area

- Refers to activities involving signage, sponsorships partnerships and other grass roots tactics
- Marketing Toolkit contains opportunity analysis guide, tactical ideas and best practices from the system
- DokShop.com a one-stop shop for franchisees to source collateral

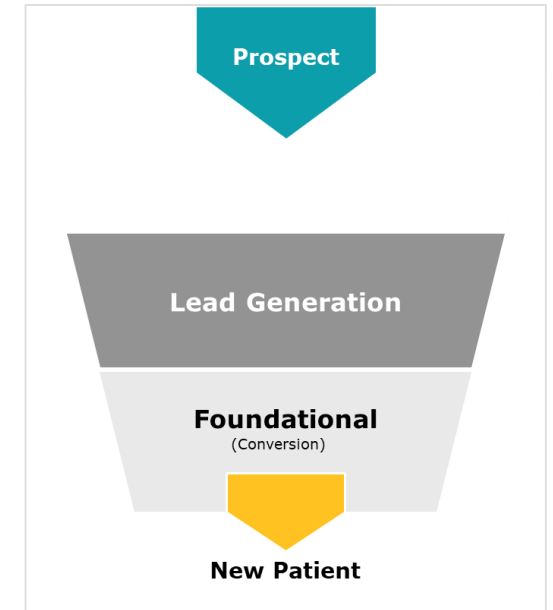
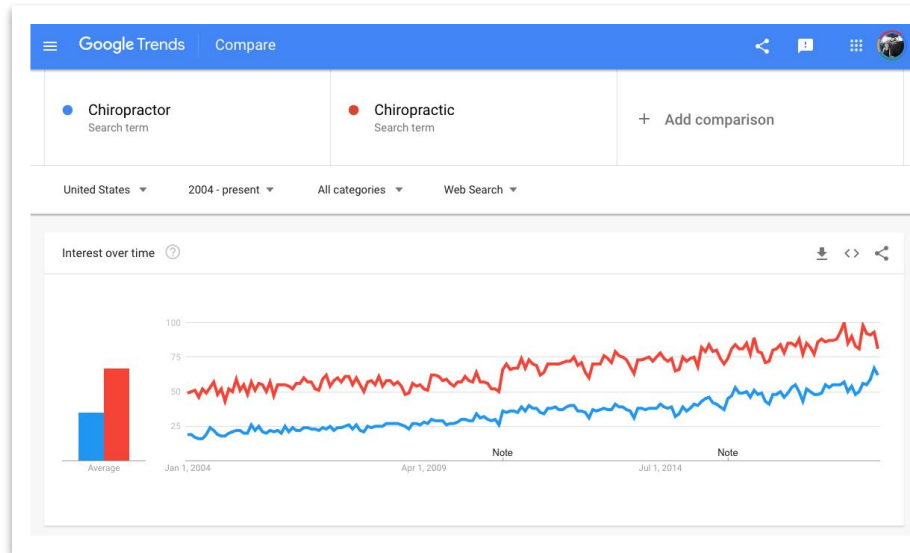


Lead Generation Marketing

Tactics that are targeted and distinctly measurable, and can be more easily tied to ROI

Paid Digital: Driving trial from self-identifiers (“relief seekers”) or look-alike audiences; paid for locally by the individual franchisee or co-op

- Primary tactic is search engine marketing (SEM); only media channel that competitive chiropractors regularly utilize
- Growing search traffic for terms like “chiropractor” and “chiropractic,” indicative of an expanding category
- Additionally, traffic-driving ads on Facebook and Instagram (SMM) and YouTube platforms



Awareness Marketing

Tactics that build name recognition and brand familiarity, fueling greater demand; evaluated by metrics such as points, views and impressions

Retail Marketing: Traditional channels driving online search and direct-load traffic, where they can be converted into a lead

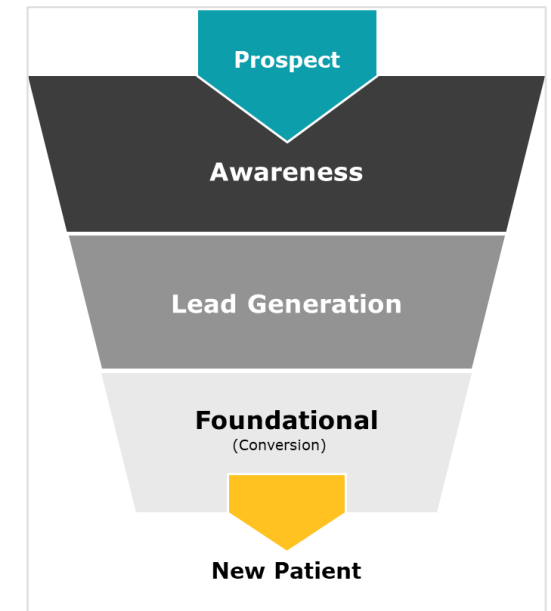
- Print can be utilized by individual franchisees or by market
- Broadcast media such as TV and radio, increasingly utilized by co-ops in heavier penetrated markets
- Outdoor (OOH) for brand and/or directional messaging, available to individual franchisees or co-ops
- Strategic partnerships (e.g., sports teams) for brand building

Paid Digital: Mimics messaging of traditional TV with enhanced targeting

- Utilize NMF to air video ads on the YouTube and Facebook platforms

Public Relations: Earned media creates content for SEO and social, helps launch new clinics, engages patient and franchise prospects

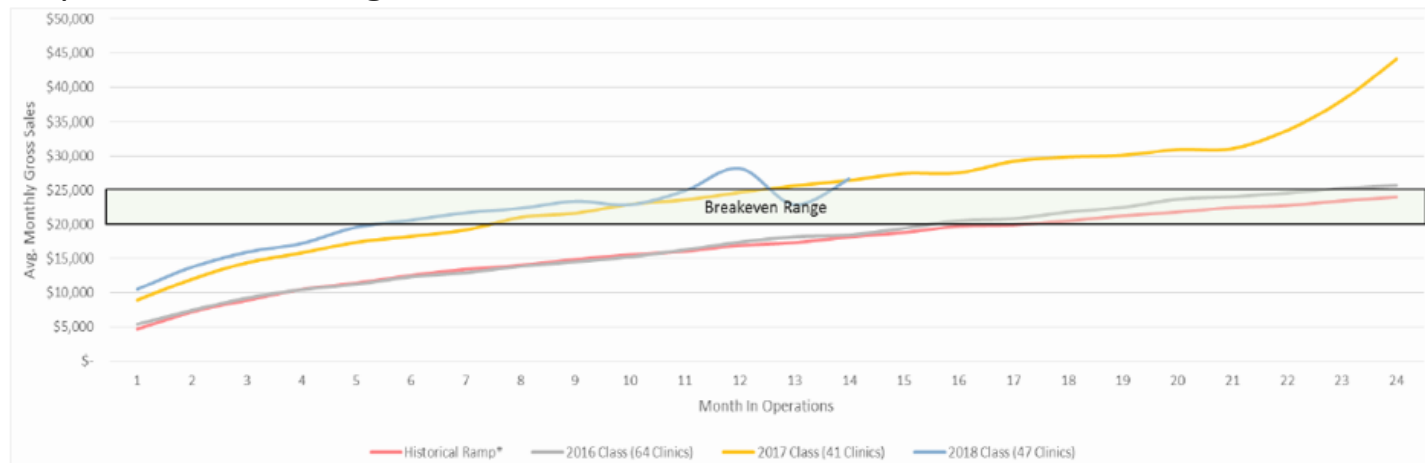
- Supports our category leadership position and stimulates national conversation about chiropractic care



Grand Openings

Turnkey program heavily driven by grassroots marketing tactics tied to fixed benchmarks

- Step-by-step, pre- and post-opening plan; activated upon lease signing
- Grass roots marketing by the franchisee with pre-registration program, PR, digital and social media support
- Marketing resource at headquarters, plus the RD or FBC in support
- Continues to enhance grand opening performance through increased adoption by franchisees; reduced new clinic time to cash flow positive from 18 to 6 months in operation on average



Two Key Projects for the Future

1

Brand Advertising: Developing our first integrated ad campaign for Fall 2019, activating new brand positioning and insights extracted from 2018 consumer research

- Objectives is to create the first recognizable consumer brand in the fragmented chiropractic category
- Designed to increase the relevance and approachability of chiropractic, while positioning The Joint as the familiar and trusted authority
- Includes refreshed television, social, outdoor and retail advertising

2

Marketing Automation (CRM): Leveraging our patient data to dramatically improve delivery of targeted and relevant, one-to-one communications to leads and patients

- Intended to enhance current email drip campaign with behavioral-driven CRM utilizing email, SMS and a patient portal/mobile app
- Goal is to deliver the right message to the right person at the right time
- Outcome will be increased lead conversion, higher lifetime patient value and greater patient satisfaction

Key Takeaways

1. The Joint has well-developed new patient acquisition and grand opening strategies that are paying dividends
2. We will be taking further steps to enhance our brand identity and name recognition, solidifying our leadership in chiropractic
3. Marketing automation holds great potential for leveraging our data and growing lifetime patient value

Questions?



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DC Recruitment & Compliance

Amy Karroum, VP of Human Resources

Dr. Steve Knauf, Director of Chiropractic & Compliance

My Background

Amy Karroum

Education

- MBA, University of Michigan
- BA, Human Resources, Michigan State University



Business Experience

- 18+ years of Human Resources experience
- 10+ years in healthcare
- Joined The Joint team in 2015



My Background

Steven Knauf, DC, CHC

Education	Business Experience
<ul style="list-style-type: none">• BS in Human Biology• Doctorate of Chiropractic, NWHHSU <div><div>NORTHWESTERN</div><div></div><div>HEALTH SCIENCES</div><div>UNIVERSITY</div></div>	<ul style="list-style-type: none">• Joined The Joint in 2011• Appointed to ABCE in 2017• Appointed to ACA’s Committee on Quality Assurance and Accountability• Certified in Healthcare Compliance (CHC), Health Care Compliance Association <div></div>

Agenda

1

Vision

2

The Team

3

**Professional
Overview**

4

**Why
Chiropractors
Choose
The Joint**

5

**The Clinical
Experience**

6

**Current
Initiatives**

7

**Compliance
Review**

Vision

To be the career
path of choice
for chiropractors.



The HR & Compliance Team

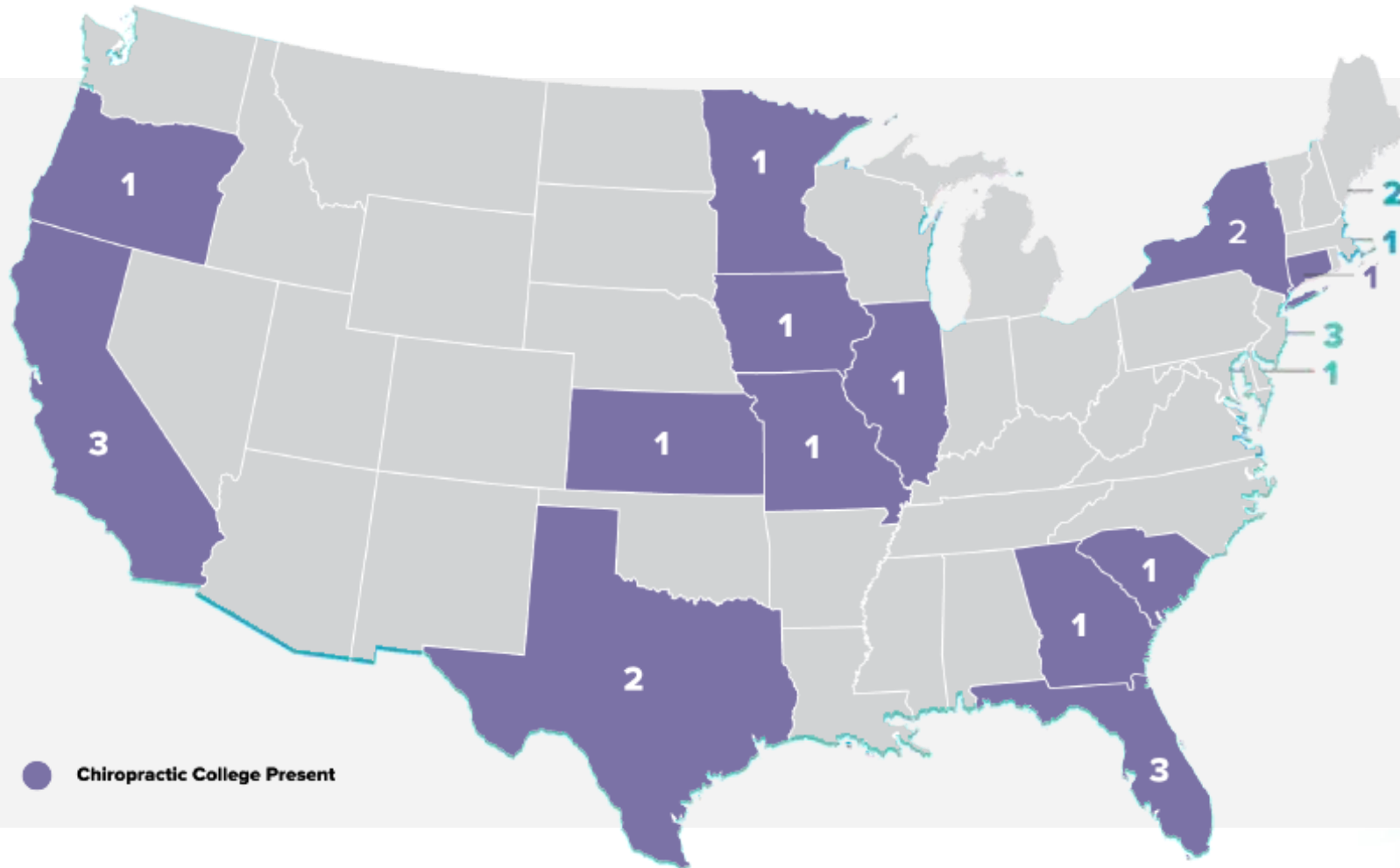
HR Team



Ops Team



Recruiting Chiropractic Professionals



~1200 chiropractors

40% of DCs have tenure ≥ 15 years

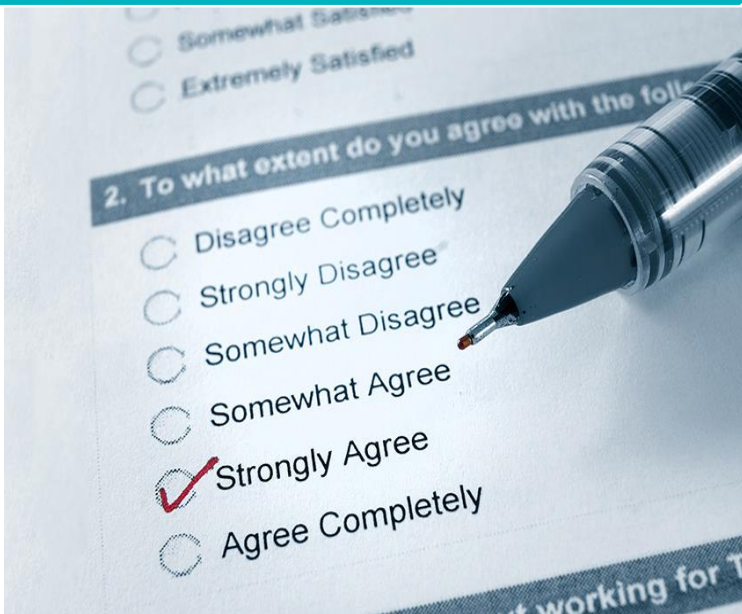
23% Palmer graduates
16% Life University graduates

Current Initiatives to Support Growth

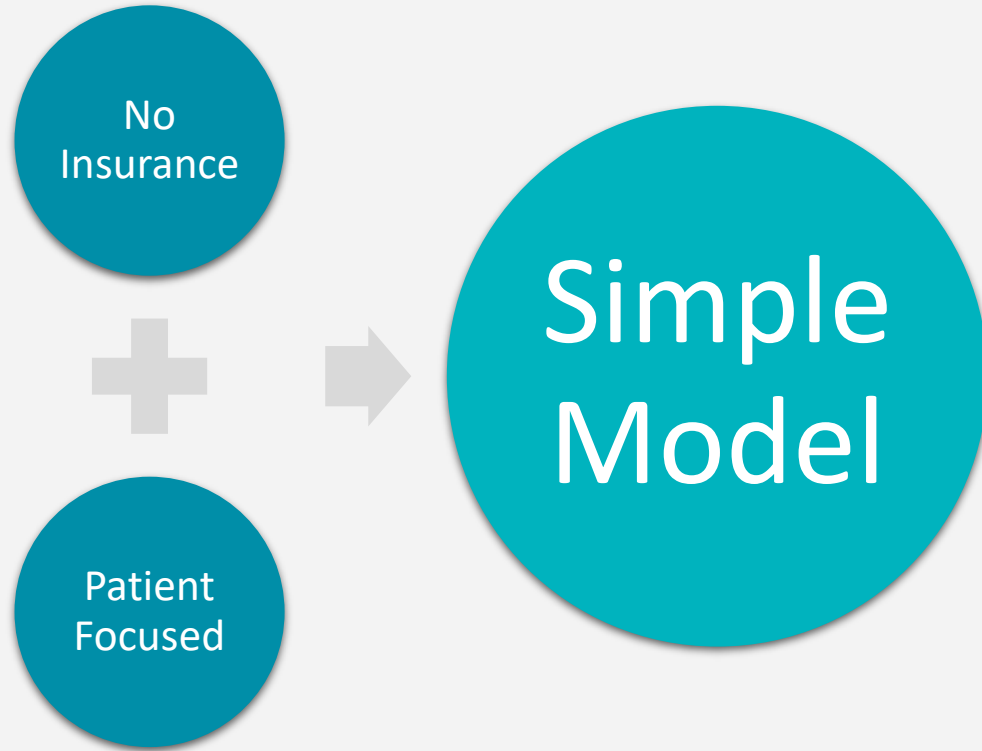
Conducted first,
comprehensive DC survey

Refine recruiting brand

Continue to build
strong relationships



Why Chiropractors Choose The Joint?



The Clinical Experience

Simplistic Staffing

The model requires minimal staff to serve patients who choose The Joint.

Patient Volumes

Chiropractors should be able to see about 60 patients per day, though some may see many more than that.

Services Provided

Doctors at The Joint provide consultations, examinations and chiropractic adjustments.

Qualifying Chiropractors

- Doctors of Chiropractic must hold a license in good standing in the state in which they practice
- Chiropractors must be able to receive malpractice coverage from one of our three required vendors
- Doctors at The Joint must complete required training tracks and receive certification



Professional Corporation (PC) Structure

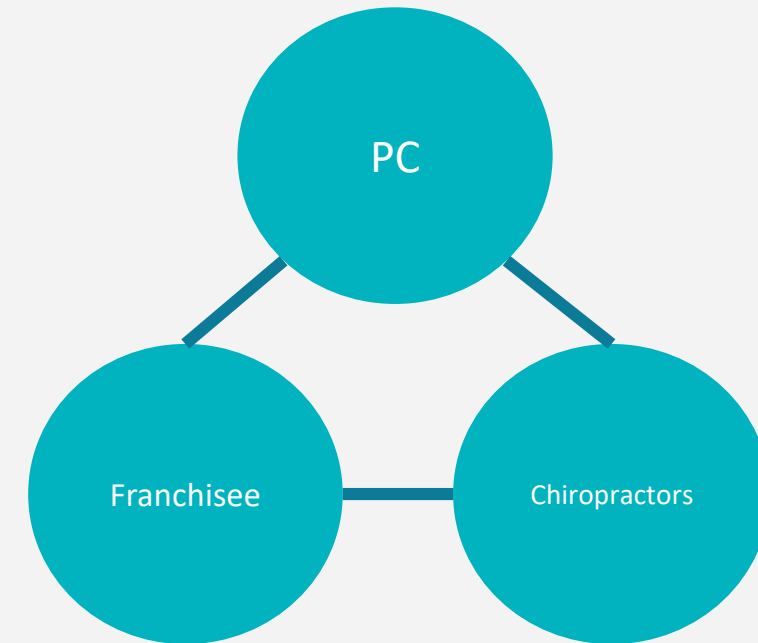
Why is it needed?

Many states prohibit the corporate practice of medicine to varying degrees. In some states this limits the owner of a practice to only a licensed professional, these are labeled as “PC states.” In other states you do not have to be a chiropractor to own a Joint clinic.

How does the PC structure work?

In short, it is a series of agreements between the franchisee, a licensed professional and the doctors practicing in the clinic. These contracts clarify the responsibilities of each party, and ensures that licensed professionals are appropriately overseeing the clinical operations.

In this structure, the PC owns the clinic and employs the chiropractic staff, the franchisee provides management services to the PC and the doctors treat patients.



Protecting Our Patients, Doctors and Franchisees

Standards Enforcement Protocol

This protocol defines an escalation and resolution process for locations that operate outside of the model. This includes clinical practices such as services and products provided to patients.



Key Takeaways

1. Recruiting and retaining DCs is critical in achieving The Joint's growth goals.
2. Effective compliance programs protect patients, doctors and investors while adding to The Joint's reputation as a leader in the profession.

Questions?



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Franchisee

Teresa DiGiuseppe, Multi-Unit Franchisee



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Operations Overview

Jorge Armenteros, VP of Operations

My Background

Jorge Armenteros

Business Experience

- 40 years franchise experience
 - 4 years as a franchisee
 - 10 years with a start-up
- International experience



Franchisee



Agenda

1

**Operations
Structure
and Roles**

2

**2017 - 2018
Executive Summary**

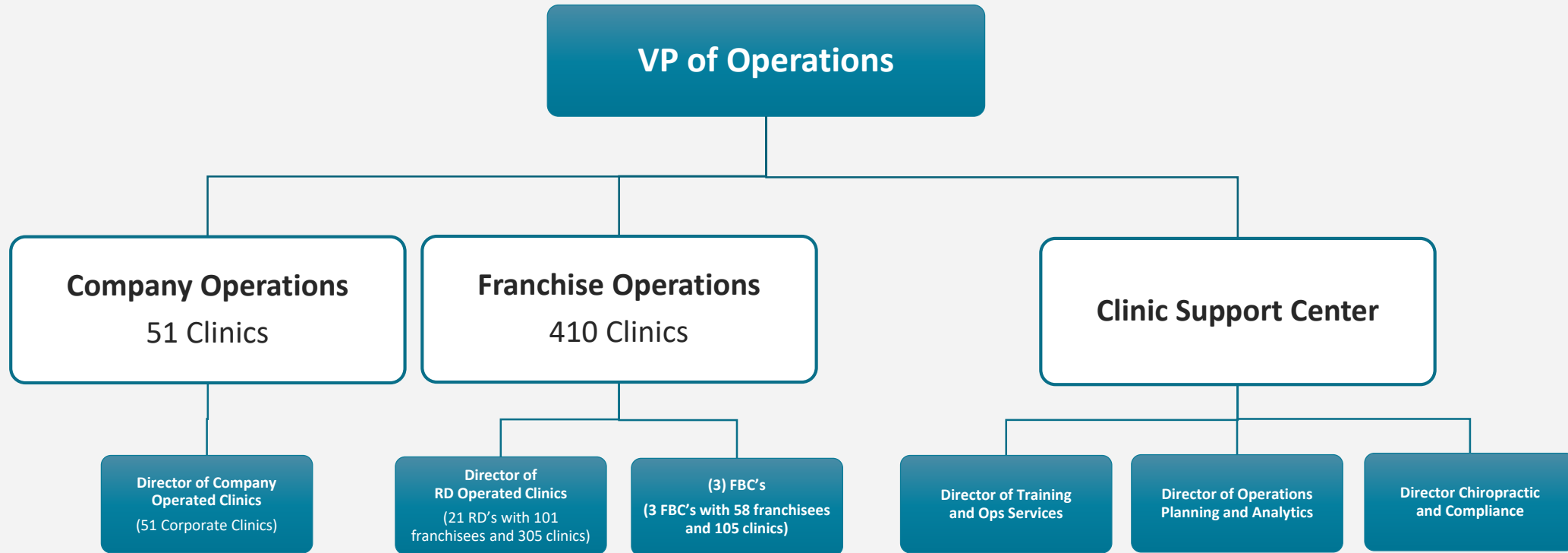
3

**2019 Four Pillar
Operations Strategy
Driving Significant Value**

4

**Key
Takeaways**

We are fully staffed and right sized for the job



We started our journey in 2017 focused on improving the patient experience and franchisee relations

The initiatives

driving our
transformation
forward have
been underway
since 2017

2017 was the year of “purposeful change”

2018 was the year of execution and significant progress

Prioritizing Operational Excellence leading with **patient focus** to build programs and systems to improve the performance of our clinics

Evaluated and Implemented New Policies with NFAB Support to improve **patient satisfaction** and sales

Created and Implemented Plans to Increase the Capabilities of Our Franchisees and Rd’s with new tools, training enhancements and internal protocols

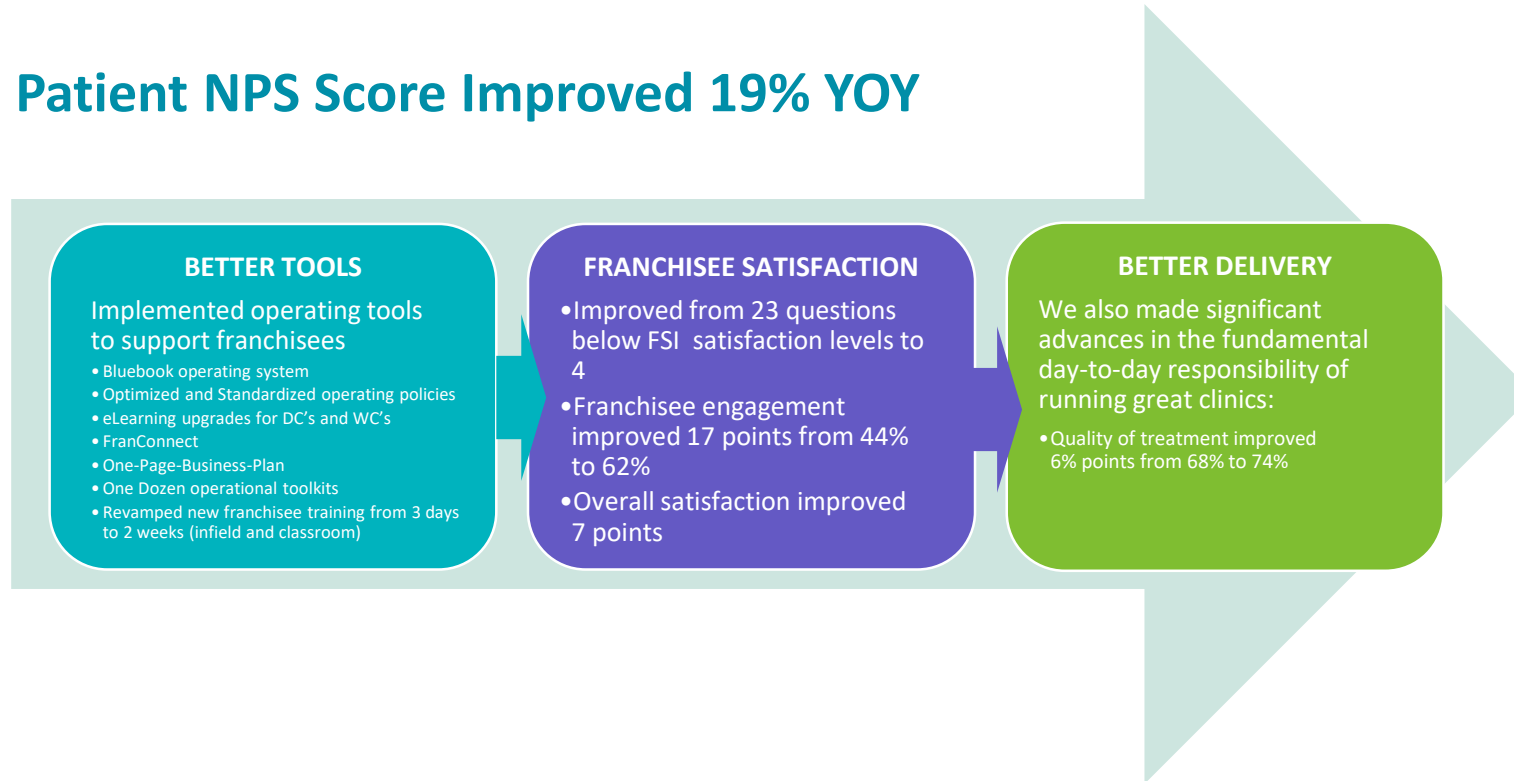
Built and Implemented a Company Operated Clinic Operations Plan including a restructure of the team to focus on optimizing clinic sales and profitability

Implemented Accountability Measures used to quantitatively assess performance outcomes in a transparent manner

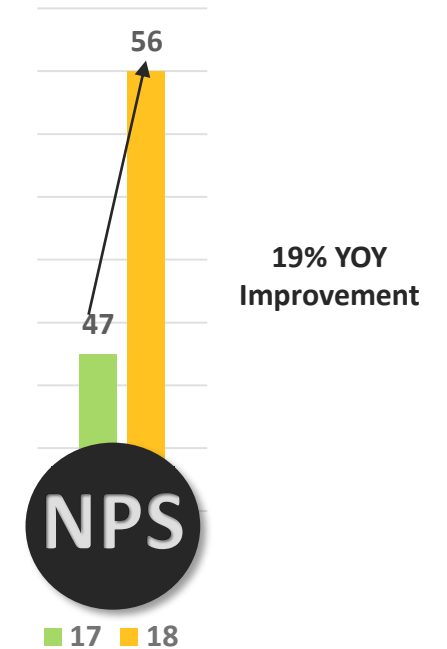
Started Journey to Build a Chiropractic Culture of Quality and Trust by putting the focus on building industry relationships, DC employment experience and improved training and oversight

Initiatives are driving results and...

Patient NPS Score Improved 19% YOY



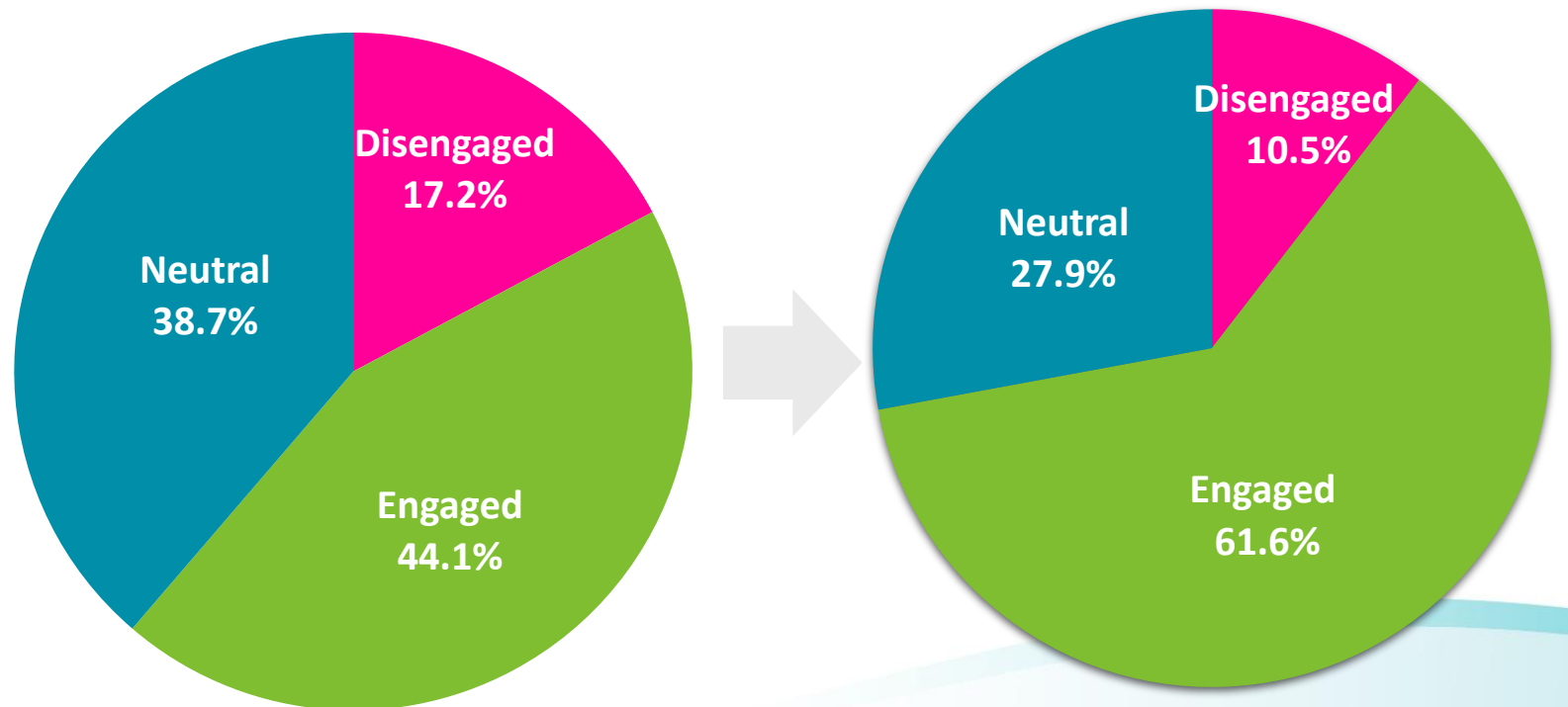
Increased Patient Loyalty



... our franchisees are more satisfied

- Franchisee Net Promoters Score (NPS) improved from 27% to 51%
- Overall franchisee satisfaction above average increased from 68% to 81%
- Existing franchisee base purchase over 50% of new licenses sold
- As we strive to be a model franchisor, we listen, partner, share, refine and invite participation from our franchisees in virtually all brand strategies and initiatives through our National Franchisee Advisory Boards
- One of the largest-ever turnouts at the 2019 Annual Franchisee Conference (135 franchisees representing 87% of our total franchise community and 94% of our total clinic) is evidence of our growing momentum and brand relevance

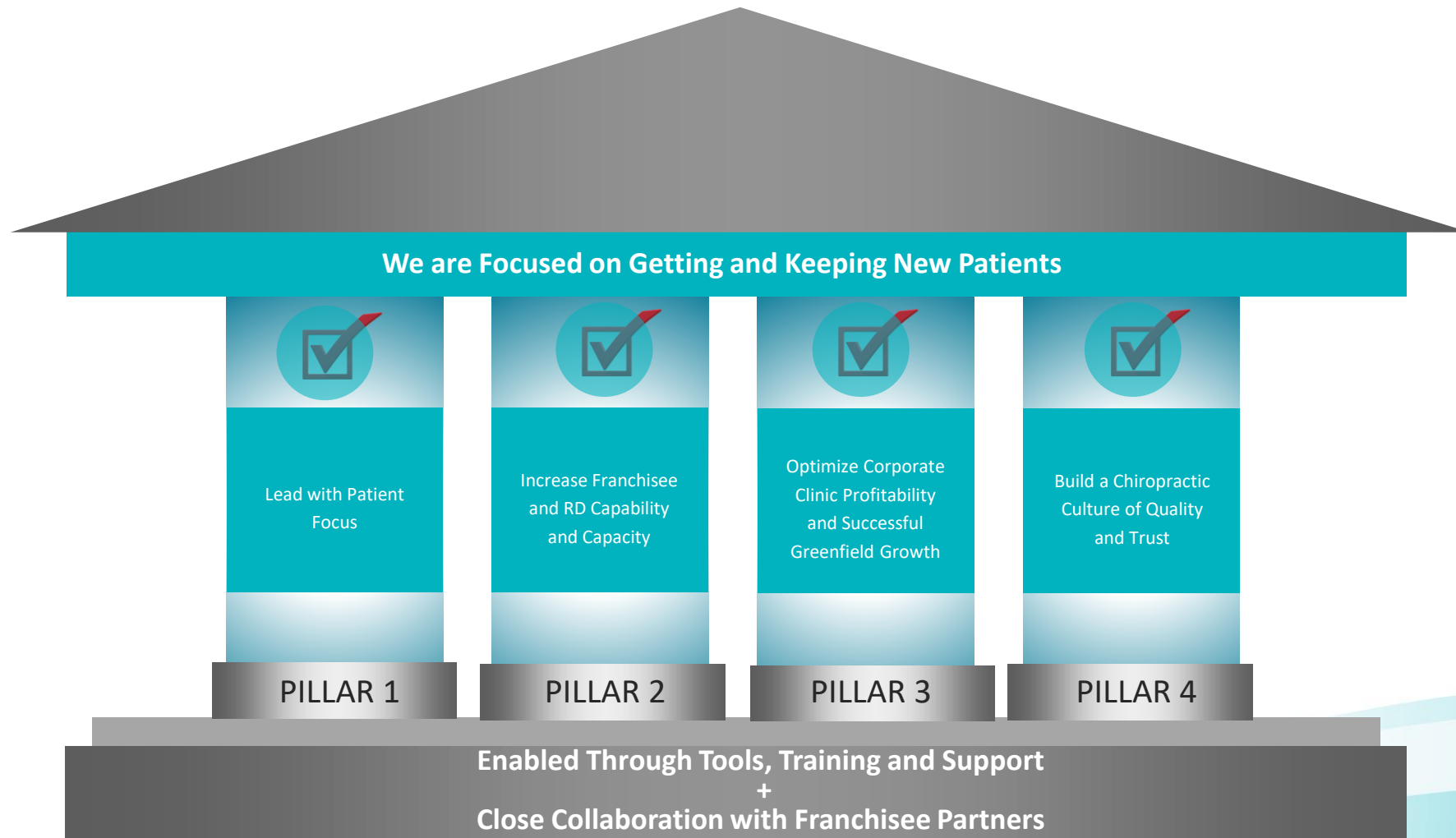
Franchisee Engagement Improved 40% YOY



2019 Four Pillar Operations Strategy



Four Pillar Operations Strategy: Driving Significant Value



1

Lead With Patient Focus

Post new policy implementation - improving key performance metrics

- Implement policies aligned to increase patient experience
- Focus on basic blocking and tackling through existing tool adoption
- Develop and deliver word class training programs (less quantity but more often)
- Invest in patient satisfaction measurement/feedback system
- Define and prioritize system needs based on results

2

Increase the Capability and Capacity of Franchisees and Regional Developers

Initiatives are improving average members per clinic

- Improve operational clinic systems infrastructure and drive adoption of system tools
- Continue to enhance Franchisee and RD training and support
- Improve clinic training and oversight through eLearning and other methodologies
- Support Axis creation and implementation

3

Optimize Corporate Clinic Profitability and Successful Greenfield Growth

Continued execution of our operations initiatives

- Optimize profitability through labor optimization model
- Continued improvements of key performance metrics through execution of our operations initiatives
- Reduce employee turnover
- Build bench strength to support growth
- New greenfield clinic expansion and achieve break-even within 6 – 9 months

4

Build a Chiropractic Culture Of Quality and Trust

Leading the chiropractic profession

- Improve industry reputation and relationships with colleges, boards and associations
- Increase chiropractic influence in our system
- Be the career path of choice for chiropractors
- Improve DC employment experience and recognition
- Improve clinic training and oversight



Key Takeaways

1. Strong partnerships with our franchisees
2. The right strategic plans that continues to evolve
3. Solid management team
4. Committed to doing the right thing for our patients

Questions?



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My Background Manjula Sriram

Education	Technology Experience
<ul style="list-style-type: none">• Bachelors: Computer Science, Electrical Engineering• Masters: Business Administration, Information Systems	 <p>The Technology Experience section displays five logos: Early Warning (a stylized red and black 'E' icon next to the text 'EARLY WARNING'), United (the word 'UNITED' in white on a blue rectangular background with a small globe icon), Walgreens (the word 'Walgreens' in its signature red script), US Foods (the letters 'US' in green above the word 'FOODS' in red), and Vail (the word 'VAIL' in red with a blue dot over the 'i').</p>

Agenda

1

The Team

2

Build vs. Buy

3

2019 Focus

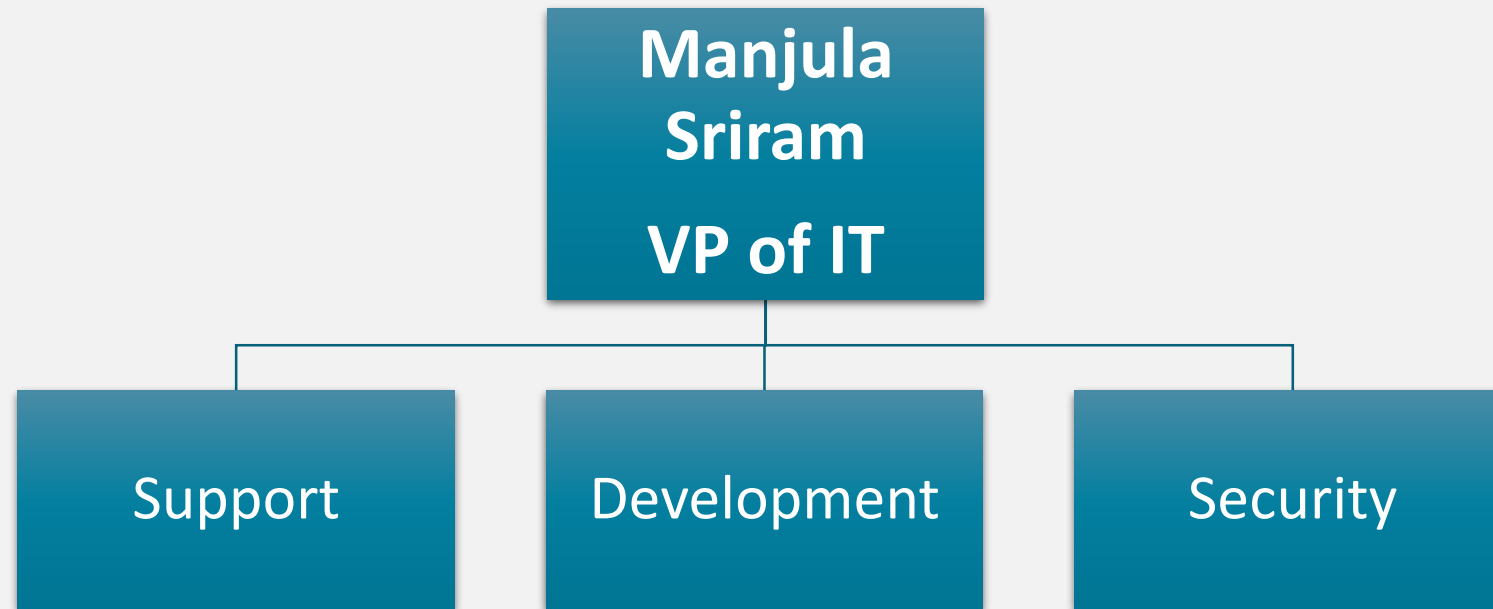
4

**Near-Term
Roadmap**

5

**Technology
Vision**

Team



Build to Buy

Vision

Partnership with SugarCRM

- Security
- Progress towards HIPAA compliance

Legacy vs Modern

Legacy Systems (CRM)

- Transactional
- Siloed
- New Sales
- Service is Cost
- Data Centric

Modern Systems (CRM)

- Recurring
- Seamless
- Cross-sell, Up-sell & New Sales
- Service is Marketing
- Relationship Centric

SugarCRM + The Joint

- Sugar **integrates seamlessly** with existing systems to provide enhanced insights into your patients and business metrics
- Modern, intuitive Interfaces drive more engaging interactions and **improved user experience**
- Sugar **drives enhanced productivity** and efficiencies – helping you grow your business with lower costs and efforts



2019 Focus

ATLAS Stability

- 2018 and 2019 focus on stabilizing our current platform
- EMV implementation for PCI compliance
- Upgraded franchisee communication platform via FranConnect

Enterprise Email System implementation

- Improved email retention
- Spam and phishing email reduction
- Encrypted email

Axis 1.0

- Patient Portal meeting the strategic deliverables (Marketing)
- Improve search functionality for campaign management (Marketing)
- Mobile Check In based on customer focus group surveys (Marketing)
- All clinic forms management (Ops)
- Automate policies and pricing enforcement through Axis (Ops)
- Exception reporting on policy breaches through Axis (Ops)
- Quick mobile access to information (Ops)
- Credit card process linked through a patient and through system only (Ops)
- Automated soap notes patient documentation audits (Ops)
- PCI Compliance (IT)

Near-Term Roadmap

2020 & Beyond

Axis

- Digital blue book
- Integration with learning management system
- Automated clinic health report
- Patient experience survey assessments system trackable by clinic and groups

Automated Marketing CRM implementation

- Implement a CRM tool that facilitates automated, personalized, target lead and patient relationship nurturing via email, SMS and mobile app, with functionality available for franchisees and marketing team

Integrate with a POS system

- A more efficient mechanism to track the performance of promotions (example: bar code, bar code scanner)

Implementation of a BI Tool

- Implement a data warehouse tool to allow high-level analytics
- Ability to pull reports/analytics to slice and dice sales, packages, conversions, new patients, attrition, etc. by clinic, market, system, corporate, franchise, RD, FBC or any additional aggregations



Key Takeaways

1. Aligning with an industry standard world class CRM platform prepares The Joint for its ongoing growth
2. The Joint has minimized its risk of stagnation by choosing to buy
3. Technology is ever changing, and we are in a continuous innovative environment to ensure optimal care for our patients



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Final Thoughts...