



optimi health™

welcome to the future of human optimization

January 15, 2021



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STRATEGIC BUSINESS ADVANTAGES

- Vertically integrated operation: Cultivation to Consumer (CTC)
- Potential multi-revenue generating assets: E-Commerce, Two permitted & completed building shells
- International sales and growth opportunities through established B2B relationships
- Signed Agreement with Licensed Dealer to develop IP (resulting IP will be 100% owned by Optimi)
- Signed Partnership Agreement with a University partner to run multiple clinical trials with Optimi proprietary IP

EXCEPTIONAL CULTIVATION FACILITIES

- In-house Health Canada consulting
- Submitted Health Canada Dealers License Application for large scale Psilocybin Cultivation
- Two 10,000 sq. ft. (each) GMP & EU GMP-capable facilities under construction.
- Expansion opportunity: +25 acres permitted & zoned for use

EXPERIENCED & PASSIONATE TEAM

- Strong Advisory Team supporting all key aspects of the business
- Experienced Management team in cultivation, finance, nutraceutical distribution, wholesale, and retail
- Agreement to work with Canada's biggest online Direct To Consumer (DTC) supplement retailer
- Experienced team operates a recently completed, Health Canada approved, cannabis facility on adjacent property

PREMIUM NUTRACEUTICALS CTC OPPORTUNITY

- Submitted NPN applications for first 7 product offerings
- Supplement line has been manufactured & tested - launching Q1 2021
- Early entry into rapidly expanding marketplace, immediate revenue
- Turn-key influencer marketing programs planned with a strong pipeline of partners





transforming identity
through human optimization

Optimi Health believes that personal identity is a fluid and evolving aspect of all our lives and encompasses our physical, spiritual and mental well-being.



6%
**ANNUAL
GROWTH**

THE GLOBAL
FUNCTIONAL
MUSHROOM MARKET
IS GROWING

\$34B
GLOBALLY

FORECAST TO \$34
BILLION GLOBALLY
BY 2025

\$18B
**MARKET
SHARE***

WITH \$18 BILLION
OF THE GLOBAL
MARKET SHARE FROM
NUTRACEUTICALS

Functional Mushrooms that drive the Market

**Chaga, Reishi, Lion's Mane and
Cordyceps extracts are the most
popular functional mushrooms.**

Advanced expertise and ongoing research help Optimi streamline high quality production. Supplements using Optimi-farmed or target sourced products will encompass a spectrum of highly valued ingredients focused on consumer trends which drive market demand.

The Functional Mushroom Market is Growing

The global functional mushroom market is growing at 6% annually, netting to \$34B globally by 2025 with \$18B of the market share from nutraceuticals (not including alternative uses for mycelium). Interest in functional mushrooms continues to grow globally for all forms (fresh, extracts, mycelium, and fruiting bodies). Customers are highly interested in mushroom-focused nutraceutical products, with over 50% of the overall functional mushroom market attributed to nutraceuticals.

Mushroom and Nutraceutical blends are simply more appealing.

Blends have a higher average cost per serving compared to pure mushroom products. Growing a variety of mushrooms can be beneficial in developing locally grown custom blended mushroom formulations. Customers appreciate and pay more for blends as they provide a wider variety of benefits. Offering blends positions Optimi to realize higher retail price per serving.



Bryan Safarik
COO & DIRECTOR

Over fifteen years of experience in Senior Management roles, as well as Founder and President of various profitable private companies. Bryan's experience includes developing operational efficiencies at Ocean Fisheries LTD before serving as Director of Marine Operations prior to the sale to the Jim Pattison group. After assisting with the successful sale of Ocean's, Bryan co-founded, and currently serves as President for BC Green Pharmaceuticals Inc. Bryan received a Bachelors of Science degree from Wingate University.



Jacob Safarik
CFO

Over 12 years of experience in accounting, project finance, business development and quality assurance. Jacob graduated from McGill University with a Bachelor of Commerce degree and is a Chartered Professional Accountant. Prior experience includes playing a pivotal advisory role in the sale of a \$6 billion business in San Francisco. Jacob also worked in Vienna, Austria where he managed various consulting and assurance engagements for the European Union. Jacob is also a cofounder of BC Green Pharmaceuticals Inc and currently serves as their Chief Financial Officer.



Mike Stier
CEO & DIRECTOR

Following Mike's studies in business management & finance at Kwantlen University, he worked for CIBC as a licensed Senior Financial Advisor managing assets over 100m. Mike specializes in M&A, corporate finance, and currently sits as President & CEO of New Leaf Ventures (CSE).



JJ Wilson
CHAIRMAN OF THE BOARD

Active CEO and Co-Founder of Ride Cycle Club and Partner at Very Polite Agency. JJ's previous experience includes leading the international expansion of Kit and Ace, in addition to developing the businesses brand, ecommerce, and retail. A recent graduate from Harvard Business School, JJ now focuses on strategic growth initiatives and development for his operating companies, in addition to independent strategic investments, and philanthropy.



Dane Stevens
CMO & DIRECTOR

An entrepreneur with 12 years experience in international product sourcing, development, manufacturing, and quality control, Dane is the founder of multiple successful wholesale and retail DTC businesses, and is currently President of Cavalier Jewellers LTD. After investing in several venture start-ups, Dane now concentrates his efforts on various philanthropic endeavours, and on the science-based benefits in the rapidly evolving world of fungi.



Jon Schintler
INDEPENDENT DIRECTOR

Jon is an accomplished senior leader, manager, developer and capital markets professional with a demonstrated track record spanning 15 years in the clean energy space. He is experienced in providing strategic leadership to organizations and C-level management. Extensive greenfield and M&A work on developing, financing, and managing utility scale wind, solar, run-of-river hydro, thermal and geothermal energy projects totaling more than 2.5 GWs.



Chip Wilson ADVISOR

Chip Wilson is a Canadian businessman and philanthropist, who has founded several retail apparel companies, most notably yoga-inspired athletic apparel company Lululemon Athletica. Wilson is widely considered to be the creator of the athleisure trend. In 2016, he organized his personal and business interests into the holding company Hold It All Inc.



Edward Safarik ADVISOR

Edward is a Member in good standing of the Law Society of British Columbia and former Founder, President and CEO of Ocean Fisheries Limited. Edward offers extensive past board experience: six year board member of Genome BC, Chairman of the Fisheries Counsel of Canada, Cochair of the Food Agriculture/Fisheries Initiative on Sustainable Economic Fisheries, Founder and Chairman of the Herring Conservation & Research Society of BC (HCRS), and a member of the Pacific Scientific Advice Review Committee (PSARC) and the Herring Industry Advisory Board (HIAB).



Harley Pasternak ADVISOR

As a fitness and nutrition specialist, Mr. Pasternak's client roster includes Ariana Grande, Lady Gaga, Rihanna, Kim Kardashian, Halle Berry, Katy Perry, Megan Fox, Robert Downey Jr., Robert Pattinson, Adam Levine, Jessica Simpson, Charlie Puth, Gwen Stefani, Ke\$ha, Hilary Duff and Jennifer Hudson. He currently stars on the E! channel's *Revenge Body* with Khloe Kardashian, makes regular appearances as a fitness contributor to *good morning America* on ABC, and formerly starred on ABC's *The Revolution*, and as a judge on *Top Model*. Mr. Pasternak has made worldwide speaking appearances in over 30 countries and is a bestselling fitness and diet author published in 14 languages in over 25 countries. He holds a Master of Science in Exercise Physiology and Nutritional Sciences from the University of Toronto and an Honors Degree in Kinesiology from University of Western Ontario. He is also certified by The American College of Sports Medicine and The Canadian Society of Exercise Physiology, and served as an exercise and nutrition scientist for Canada's Department of National Defense.



Elfi Daniel-Ivad LICENSING ADVISOR

Elfi formally served as Head of Submissions, Regulatory at Eurofins Experchem Laboratories Inc. In this role, she led a team of regulatory professionals in the development of regulatory submission strategies for Natural Health Products (NHPs), OTC drugs, cosmetics, medical devices, food products, site licenses, medical establishment licenses and applicants to become licensed producers and dealers of federally controlled substances.



Leigh Grant FACILITY ADVISOR

Over 20 years experience in the HVAC industry and indoor cannabis cultivation, Leigh specializes in the development of advanced indoor horticulture systems, for federally licensed cannabis producers. Acknowledged as an indoor horticulture facility design expert, Leigh consulted for Broken Coast Cannabis, from inception to its latest expansions under the Aphria ownership group, and BC Green Pharmaceuticals.

Limited Competition to Grow Fruiting Bodies:

Almost no competitors currently growing and selling fruiting bodies in Canada. Optimi aims to position itself as the pre-emptive grower of fruiting body mushrooms in North America. Optimi brand positioning as “Grown in Canada” targets consumer facing differentiation in the high growth nutraceutical market.

Differentiated Products:

Fruiting Bodies offer higher purity and net 35% higher higher average revenue per serving. While more costly, farming fruiting bodies positions Optimi to offer a differentiated product. While not the leading factor, customers pay more for fruiting body based products. Research heavily favors fruiting body based products given their increased potency.

Better Extraction Processes:

Throughout the industry alcohol and hot water extraction processes are most common. Because Optimi invests in fundamental research, advanced extraction processes and related production techniques are being introduced. Since customers do not differentiate based on extraction processes, consideration for cost-effective solutions delivering the highest returns are achieved when aimed at reducing the \$ per serving to the consumer.



MINDFUL MUSHROOM CAPSULE

Lion's Mane is used by high performance individuals looking to get an edge.



IMMUNITY MUSHROOM CAPSULE

Turkey Tail is one of the most commonly found mushrooms in the world. Yet, its incredible benefits put this mushroom in a league of its own.



LONGEVITY MUSHROOM CAPSULE

The Longevity capsules are here to repair and recharge. Known as the "Queen of mushrooms" and "mushroom of immortality," Reishi has been used for over 2,000 years by eastern societies to help promote longevity and wellbeing.



DEFENSE MUSHROOM CAPSULE

The Defense capsules are your protector and fighter. Chaga is often called the king of medicinal fungi and has been used as a medicinal fungus in Asia for thousands of years.



OPTIMI FORMULATION CAPSULES

Meet your daily mushroom complex. A proprietary blend of 5 functional mushrooms formulated to optimize your day-to-day performance. We created the Optimi Formulation with your betterment and peak performance in mind.



PERFORM MUSHROOM CAPSULE

Wild cordyceps is a parasitic fungus that use insects as a host to flourish. The Perform capsules are here to replenish and provide antioxidant and immune support.



Optimi Products for an Optimized Lifestyle

LIMITLESS VEGAN PROTEIN

Designed for maximum human optimization, we've combined our proprietary blend of five functional mushrooms with a delicious vegan protein powder. This perfect stack of nutrition and functional mushrooms will keep you fueled and thriving. We created the Optimi Vegan Protein Formulation with your betterment and peak performance in mind.



There are 5 mushrooms in particular that are gaining significant popularity, each with clinically proven benefits that can be used in isolation, or together for an holistic approach to wellness.

Optimi Health's highly sought-after range of fungi varieties includes:



LIONS MANE

- Immune Support
- Antioxidant



CORDYCEPS

- Immune Support
- Antioxidant
- Used in Traditional Chinese Medicine to help replenish lungs and kidneys



REISHI

- Immune Support
- Antioxidant
- Adaptogen



CHAGA

- Immune Support



TURKEY TAIL

- Immune Support
- Used in Traditional Chinese Medicine to fortify the spleen



Our popular and proven varieties aim to deliver a lineup of uniquely Canadian proprietary nutraceutical products aimed at kickstarting optimal human performance.

Optimi Health is positioning itself to meet the needs of the rapidly expanding health & wellness sector and to serve consumers looking to prioritize personal optimization through consumption of high quality, natural plant-based products.

Pharmaceutical Grade Psilocybin Products:

Through the research partnership, Optimi has immediate access to a large, and legal, patient base to run clinical trials.

Optimi aims to strategically position itself as a large scale supplier of GMP-grade psilocybin for Stage 2 & 3 clinical trials upon receipt of a dealers license.

Current production of legal GMP quality psilocybin is not readily available and will not be able to meet the quality standards set by Health Canada for clinical trials.

Optimi Health has already designed and built-in the superior cultivation, advanced research capability, and scalable production ability into an extensive business plan for its ongoing facility build-out.



Medicinal (Current)



ANXIETY
(high growth segment)



DEPRESSION
(mental health is very commonly overlooked)



ADDICTION
(smoking, alcohol, opioids)



TARGETED DISORDERS (ie. PTSD)



Wellness (Future)



MENTAL PERFORMANCE
(creativity, production in the workplace)



PHYSICAL PERFORMANCE
(endurance)



SOCIAL USE
(Low risk for addiction)

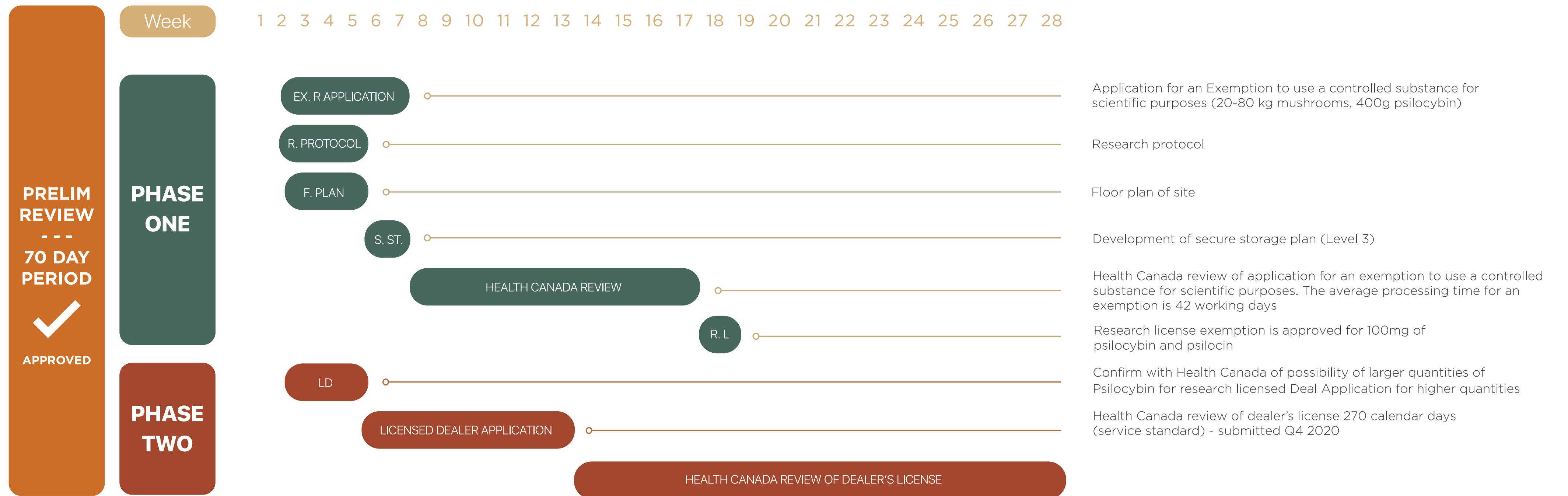


SUPPLY OTHER BRANDS
with high quality products (wholesale)

Optimi Health’s application to Health Canada is underway and if approved, paves the way to pilot cultivation, advanced research and development, control studies, peer review registry and a significant competitive timeline advantage towards pharmaceutical industry applications.

Controlled Substance Research License for Psilocybin

Approval anticipated Q2 2021 (Subject to COVID related delays)





Optimi Farms

FACILITY ONE: OPTIMI FUNCTIONAL

Optimi Farms Facility #1 is focused on growing high demand functional mushroom varieties such as Lion's Mane, Reishi, Turkey Tail and Cordyceps.

Operational Considerations:

- Immediate sales of Canadian grown functional mushrooms
- Efficient design configuration & multiple dedicated areas for maximum yield
- Integrated environmental controls and cultivation systems (Argus Controls)
- Multiple climate controlled rooms allows for a variety of strains and reduces contamination risk (GMP)
- No extraction markup or loss in wholesale margin from co-packers using Optimi functional mushroom growth formulas and methods.



Optimi Farms

FACILITY TWO: OPTIMI DEVELOPMENTAL

Optimi Farms Facility #2 is designed to accommodate either functional mushroom or pharmaceutical grade production (GMP) of functional or psychoactive mushrooms (i.e. containing psilocybin), and is intended to service both large scale medicinal, and potential wellness market opportunities.

Operational Considerations:

- Health Canada research exemption license - approved
- Health Canada dealers license - pending
- Onsite product cultivation, extraction, testing, fulfillment, shipping, distribution and sales
- Opportunity to supply Health Canada certified research programs, clinical trials & academic studies
- Pre-existing cannabis connections to Europe, and partnerships established in Canada for medicinal purposes through a contractual agreement with BC Green Pharmaceuticals.
- Infrastructure in place to capitalize on the increasing regulatory acceptance of psilocybin.



Optimi Labs

KEY FUNCTIONS

- Optimize commercial cultivation processes
 - Improve strain quality & yield
 - Improve extraction efficiencies
 - Fungi extract innovation
 - Product development
 - Innovation in human delivery mechanisms
 - Synthetic and non-synthetic compound exploration
 - Active compound investigation
 - Pharmaceutical development & new drug formulation research
- Optimi Labs is developing an intellectual property (IP) strategy encompassing delivery mechanisms, synthetic compounds, extraction methods, isolation of chemical compounds, new formulations, testing and protocol regimens specific to mushroom based products. To expedite innovation, Optimi Labs works with both academic and strategic development partnerships.
- The Future of Mushrooms: In order to include psychedelic products in the Company's extended research activities, the Company has received a Research Exemption with Health Canada.



Broad Health Benefits:

Functional mushroom benefits range from improved physical to mental wellness (stress resistance). From a select base of key mushroom strains Optimi Farm aims to deliver products with a broad range of benefits. Ongoing scientific and market research combined with positive customer reviews support product efficacy and messaging designed to instill consumer confidence, brand awareness, and repeat purchasing interest.

Popularity for Ready to Consume Formats:

Examples include mushroom-enriched coffees / teas / protein powders which all net a higher average revenue per serving compared to simple mushroom extract products (e.g. capsules, powders). Products sold by Optimi will achieve significant margins when processed into ready-to-consume formats. Value added, easy consumption methods that are complimentary to everyday products drive consumer consideration when formulating products.

Wellness Brands Net Higher:

The average cost per serving of wellness focused brands are positioned with higher average price per serving compared to mushroom or supplement focused brands. Optimi aims to benefit from vertical integration through Optimi brand name recognition for Human Optimization. Positioned as a wellness brand vs. a mushroom / supplement-only brand allows Optimi to target a broader customer base willing to invest more in personal optimization.

Pre-operational Facilities Constructed

Optimi Health is preparing to launch its business through the construction of two purpose-built 10,000 sq. ft. facilities in British Columbia. Once operational, these facilities will be dedicated to cultivation, processing and agronomic excellence. Optimi has invested time, capital and professional resources into the future of human optimization.

Cultivation -to- Consumer

From supplements and nutraceuticals, to future pharmaceutical opportunities, Optimi is developing a vertically integrated industrial scale operation initially targeting the rapidly growing functional mushroom sector. As the Company launches commercial operations, in-house expert research and its world-class advisory teams aim to nurture concepts into products, and a regional business into a global leader.

Strategically Located

Welcome to business-friendly and environmentally conscious Princeton, British Columbia. Optimi aims to cultivate, extract, process, package and ship the finest strains of functional mushrooms from its two purpose-built GMP capable facilities.

Multiple Revenue Generating Assets in Development

Offering diversity and the foundation to scale, diversify, and capitalize on the immense opportunity within the rapidly expanding business of fungi. Future product development has been initiated via submission of a Health Canada application for advanced research into psychoactive formulations.

Company	Ticker	Market Cap (\$MM)	OPERATIONS					DRUG DEVELOPMENT		
			Cultivation/ Processing	Clinics/ Retreats	Functional Mushrooms	Research Exemption	Dealers License	Phase of Primary Clinical Trial	Primary Psychedelic Compound	Primary Indication

Psychedelics - Drug Development & Functional Mushrooms

COMPASS Pathways plc	NasdaqGS:CMPS	\$2,130.7				X		Phase 2B	Psilocybin	Treatment Resistant Depression (TRD)
Mind Medicine (MindMed) Inc.	NEOE:MMED	\$1,674.0						Phase 2B	LSD	Anxiety
Cybin Inc.	NEOE:CYBN	\$257.7						Phase 2	Psilocybin	Major Depressive Disorder (MDD)
Revive Therapeutics Ltd.	CNSX:RVV	\$171.1						Phase 1	Psilocybin	Methamphetamine Use Disorders
Seelos Therapeutics, Inc.	NasdaqCM:SEEL	\$95.8						Phase 1	Ketamine	Acute Suicidal Ideation
HAVN Life Sciences Inc.	CNSX:HAVN	\$80.7			X	X		Pre-Clinical		
Mydecine Innovations Group Inc.	CNSX:MYCO	\$81.3	X		X		X	Phase 2A	Psilocybin	Post-Traumatic Stress Disorder (PTSD)
BetterLife Pharma Inc.	CNSX:BETR	\$96.0						Pre-Clinical	LSD	
Red Light Holland Corp.	CNSX:TRIP	\$72.4	X							
Pure Extracts Technologies Corp.	CNSX:PULL	\$49.4	X		X					
Mind Cure Health Inc.	CNSX:MCUR	\$39.4			X			Pre-Clinical		
Entheon Biomedical Corp.	CNSX:ENBI	\$46.2						Phase 1	DMT	Addiction and Substance Abuse
Psyched Wellness Ltd.	CNSX:PSYC	\$31.1			X					
Better Plant Sciences Inc.	CNSX:PLNT	\$27.0			X					
Pharmadrug Inc.	CNSX:BUZZ	\$14.8								
New Wave Holdings Corp.	CNSX:SPOR	\$15.8			X					
Lobe Sciences Ltd.	CNSX:LOBE	\$11.2						Pre-Clinical	Psilocybin	Post-Traumatic Stress Disorder (PTSD)

Psychedelics - Clinics

Field Trip Health Ltd.	CNSX:FTRP	\$138.7		X				Pre-Clinical	MDMA	Post Traumatic Stress Disorder (PTSD)
Numinus Wellness Inc.	TSXV:NUMI	\$237.4	X	X		X	X	Compassionate Access Trial		
Champignon Brands Inc.	CNSX:SHRM	\$157.8	X	X	X			Pre-Clinical		
Optimi Health Corp.	CNSX: OPTI		X		X	X	Pending	Pre-Clinical	Psilocybin	Anxiety

Source: S&P Capital IQ, & company filings, share price & market cap. data as of January 7, 2021

OPTIMI HEALTH CORP.

Canadian Securities Exchange IPO - January 2021



Capitalization Table	SHARES	CASH	PRICE
Founders & Management	20,000,000	\$1,000,000	
Family & Friends Seed Round	17,963,005	\$4,490,751	\$0.25
Pre IPO	37,963,005	\$5,490,751	
Warrants			
Founders & Management	10,000,000	\$1,000,000	\$0.10
Family & Friends Seed Round Warrants	17,963,005	\$7,185,202	\$0.40





OPTIMI HEALTH CORP.

Source and Use of Funds

IPO financing - January 2021

We intend to use the existing working capital and net proceeds from the Offering as follows:

Use of Available Funds

**Estimated Amount
to be Expended
(Minimum Offering)**

**Estimated Amount
to be Expended
(Maximum Offering)**

Capital expenditures for facilities

\$6,578,498

\$6,578,498

Submission and pursuit of application for research exemption, dealer’s license and research and development initiatives related to same

\$450,000

\$650,000

Investment in e-commerce business and launch of online platform

\$1,250,000

\$1,750,000

General and Administrative

\$1,993,934

\$1,993,934

Unallocated working capital

\$2,276,568

\$6,226,568

TOTAL

\$12,549,000

\$17,199,000



THANK YOU

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