

A couple is sitting on a sandy beach, smiling and talking. A large, fluffy white dog is sitting next to them. In the background, there are green hills and mountains under a bright sky. The scene is peaceful and scenic.

PET IQ®

Smarter Pet Health

Services Operational Update

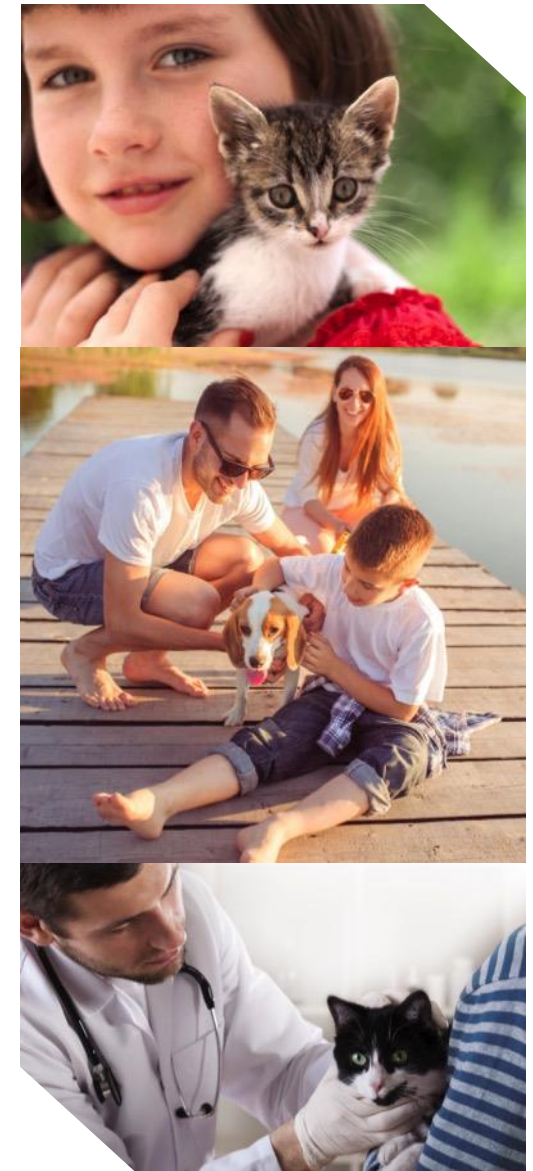
Fayetteville, NC

October 17, 2019

- **MISSION STATEMENT AND GROWTH STRATEGY**
- **COMMUNITY CLINIC UPDATE**
- **WELLNESS CENTER OPENING AND PROMOTIONAL MODEL**
- **WELLNESS CENTER EXPANSION UPDATE**

PRESENTERS

Susan Sholtis, President
Danny Lysenko, GM



PET IQ[®]

Smarter Pet Health

Veterinary Services | National Brand Distribution | Product Manufacturing





PET IQ[®]
Smarter Pet Health

OUR MISSION:

To deliver a smarter way for pet parents to help their pets live their best lives through convenient access to affordable products and services.



OUR MISSION

WE ARE ADVOCATES FOR PET PARENTS

To deliver a smarter way for pet parents to help their pets live their best lives through convenient access to affordable products and services.

CORE VALUES
How we act



COMMITMENT



QUALITY



INTEGRITY



TEAMWORK

PILLARS FOR SUCCESS
How we win

CONVENIENT

AFFORDABLE

VITAL

COMPASSIONATE

CUSTOMER FACE
How we go to market

Veterinary Services | National Brand Distribution | Product Manufacturing



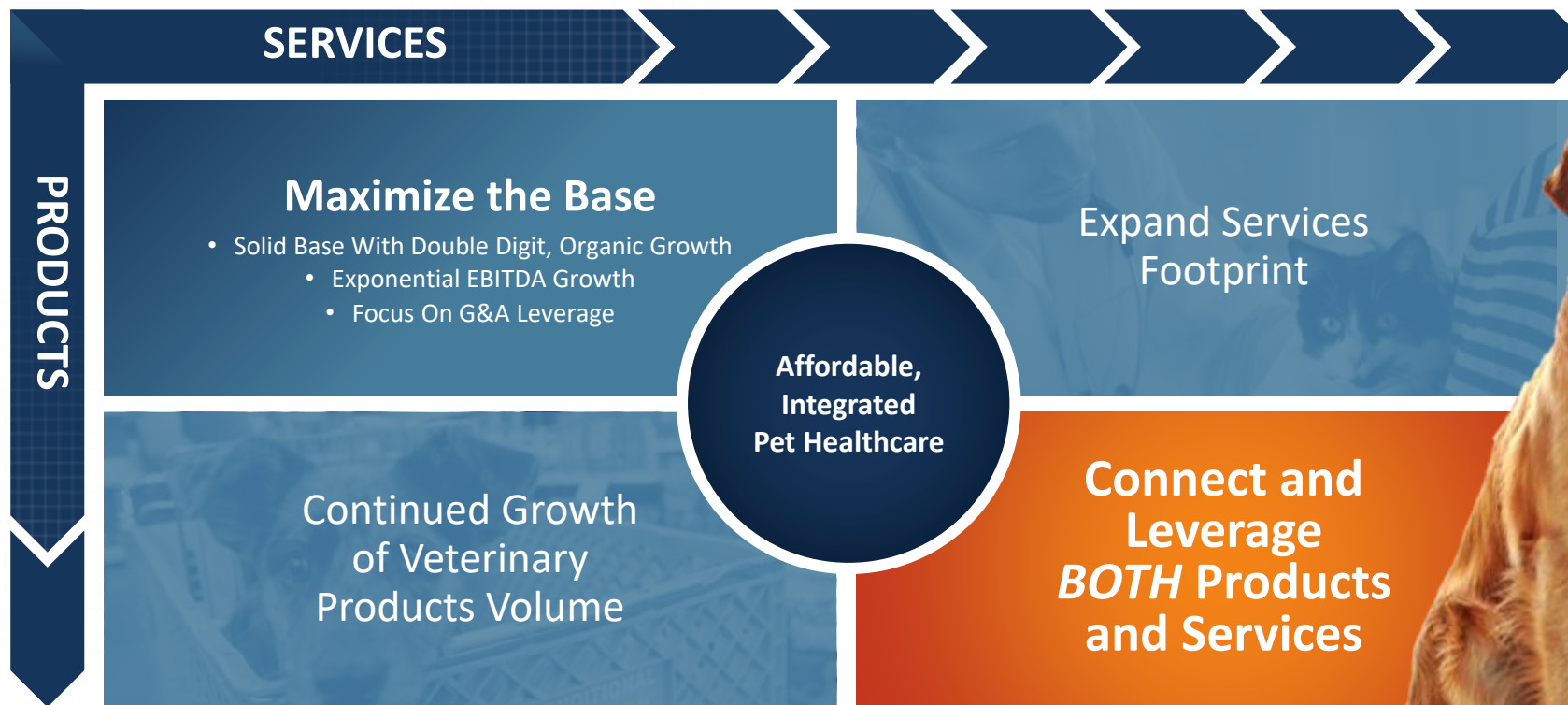
BRAND PROMISE

SMARTER PET HEALTH

PETIQ Growth Strategy

CORE BUSINESS GROWTH OUTPACES THE MARKET TODAY

Further Acceleration Happens with Expansion Beyond the Base



Growth ambition leverages core Product & Services businesses to become an integrated, omni-channel pet healthcare business



COMMUNITY CLINICS



PETIQ Services Brands

MASS RETAILERS

Wellness Centers Only



PET SPECIALTY AND OTHERS

Mobile + Wellness Centers

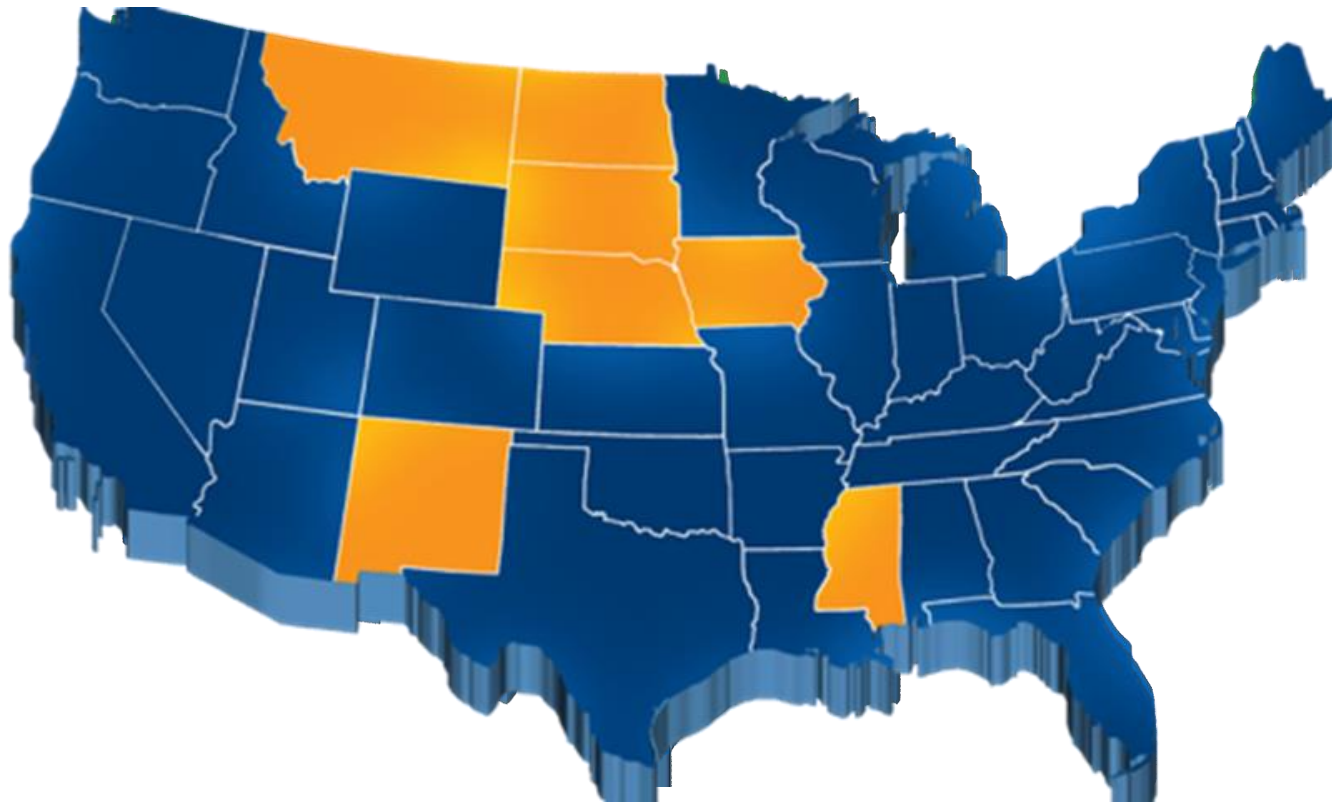


TRACTOR SUPPLY

Mobile + Wellness Centers



Nationwide Infrastructure



CURRENT FOOTPRINT

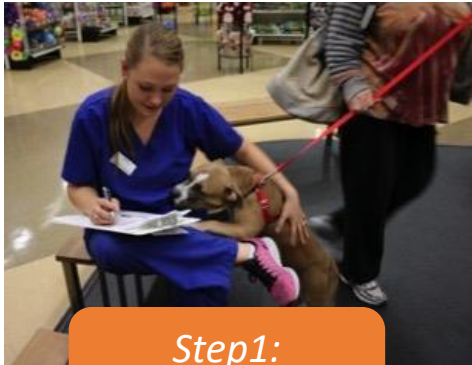
<p>41 STATES</p> 	<p>+1MM PETS SERVED</p> 
<p>3,400 CLINIC LOCATIONS</p> 	<p>+1,000 EMPLOYEES</p> 
<p>250 PARTNERS</p> 	<p>+1,500 VETERINARIANS</p> 
<p>76,000 MOBILE CLINICS</p> 	<p>100+ WELLNESS CENTERS</p> 

**OPERATING VETERINARY CLINICS
NEAR 90% OF THE U.S. POPULATION**

Position in the Market

Service Provider	Footprint Coverage (States)	Multiple Partnerships	Top 20 US Pet Retailer	Non-Pet Retailers	Mobile Clinics	Wellness Centers
BANFIELD PET HOSPITALS	44	X	1	X	X	✓
NATIONAL VETERINARY ASSOCIATES (NVA)	43	X	0	X	X	✓
VCA ANIMAL HOSPITALS	43	X	0	X	X	✓
vip.petcare	41	✓	12	✓	✓	✓
VETCO (PETCO)	32	X	1	X	✓	✓
SHOTVET	5	✓	2	✓	✓	X
GOOD NEIGHBOR VET	3	✓	2	✓	✓	X
PET PREVENTIVE CARE	3	✓	0	X	✓	✓
VAXSMART	3	✓	1	✓	✓	X
THRIVE	3	X	1	X	X	✓
AFFORDABLE PET VACCINES	2	✓	0	✓	✓	✓
EZ VET	2	X	1	X	X	✓
PETSTOP	2	✓	0	✓	✓	X
ESSENTIALS PETCARE	2	X	1	✓	X	✓
VACCINATION STATION	1	✓	0	✓	✓	X

Community Clinic Model



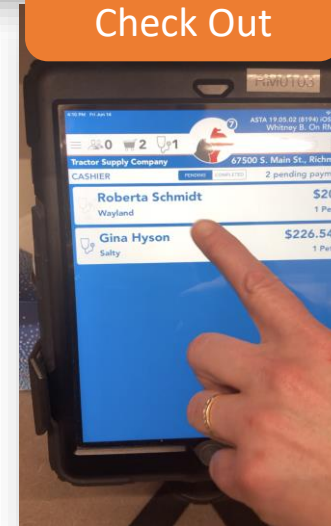
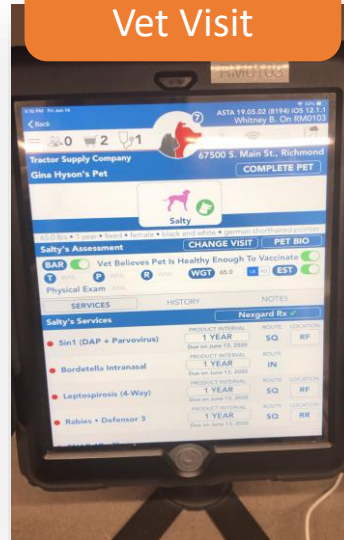
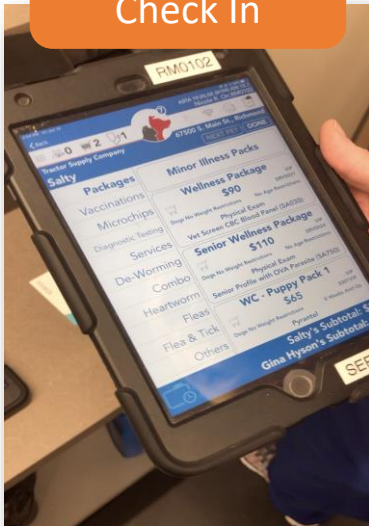
Step 1:
Check In



Step 2:
Vet Visit



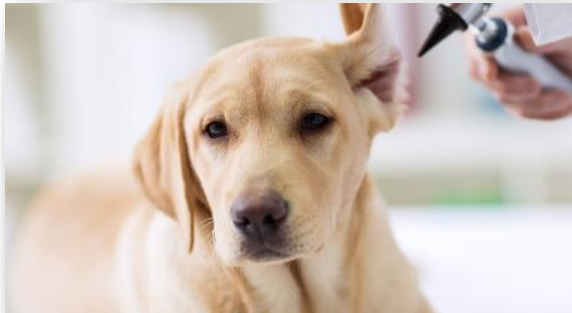
Step 3:
Check Out



* 74K clinics held in 2018 * Each rig operates 1-3 per day * Time of each clinic @ 1.5-2 hours * 8-60 pets per clinic

Community Clinic Services Offered

- Vaccinations
- Microchipping
- Heartworm Prevention
- Diagnostic Testing & Deworming
- Prescription Medications
- Nail Trims



DOG	CAT																																						
<div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;"> Puppy Pack 1 5in1, Deworm, Fecal Test \$60 </div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;"> Puppy Pack 2 5in1+Lepto 4, Nasal Bordetella, Deworm \$69 </div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;"> Puppy Pack 3 5in1+Lepto 4, Injectable Bordetella, Deworm \$69 </div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;"> Dog Pack 5in1+Lepto 4, Bordetella, Fecal Test \$75 </div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px; text-align: center;"> K9 Influenza Pack - \$39 </div> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 5px; margin-bottom: 5px; text-align: center; color: #0070C0;"> + K9 Rabies or Fecal Test to any Pack \$15 ea. </div> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 5px; margin-bottom: 5px; text-align: center; color: #0070C0;"> + K9 Heartworm/Lyme Combo Test to any Pack \$15 ea. </div> <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 5px; margin-bottom: 5px; text-align: center; color: #0070C0;"> K9 Heartworm/Lyme Combo Test <small>With Purchase of 12-Month Supply of Heartworm Preventative</small> \$12 </div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px; text-align: center;"> CANINE: INDIVIDUAL VACCINES </div> <table style="width: 100%; border-collapse: collapse;"> <tr><td>Rabies</td><td style="text-align: right;">\$19</td></tr> <tr><td>Lyme</td><td style="text-align: right;">\$33</td></tr> <tr><td>Rattlesnake - Available Regionally</td><td style="text-align: right;">\$35</td></tr> <tr><td>5in1 (DA2P + Parvovirus)</td><td style="text-align: right;">\$33</td></tr> <tr><td>Bordetella</td><td style="text-align: right;">\$33</td></tr> <tr><td>Leptospirosis (4-way)</td><td style="text-align: right;">\$33</td></tr> </table> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px; text-align: center;"> \$3 MEDICAL DISPOSAL FEE PER PET </div>	Rabies	\$19	Lyme	\$33	Rattlesnake - Available Regionally	\$35	5in1 (DA2P + Parvovirus)	\$33	Bordetella	\$33	Leptospirosis (4-way)	\$33	<div style="background-color: #70AD47; color: white; padding: 5px; margin-bottom: 5px;"> Kitten Pack 1 3in1, Deworm, Fecal Test \$49 </div> <div style="background-color: #70AD47; color: white; padding: 5px; margin-bottom: 5px;"> Kitten Pack 2 3in1, FeLV Deworm \$56 </div> <div style="background-color: #70AD47; color: white; padding: 5px; margin-bottom: 5px;"> Kitten Pack 3 3in1, FeLV, PureVax Rabies, Deworm \$69 </div> <div style="background-color: #70AD47; color: white; padding: 5px; margin-bottom: 5px;"> Cat Pack 3in1, PureVax Rabies, Fecal Test <small>(Exposed to Outdoor Cats Add FeLV...\$15)</small> \$67 </div> <div style="background-color: #70AD47; color: white; padding: 5px; margin-bottom: 5px; text-align: center;"> FELINE: INDIVIDUAL VACCINES </div> <table style="width: 100%; border-collapse: collapse;"> <tr><td>PureVax Rabies</td><td style="text-align: right;">\$33</td></tr> <tr><td>3in1 (FVRCP)</td><td style="text-align: right;">\$33</td></tr> <tr><td>Feline Leukemia (FeLV)</td><td style="text-align: right;">\$33</td></tr> </table> <p style="font-size: small; color: #70AD47; text-align: center;"> PACKAGE PRICES DO NOT INCLUDE FEES FOR BOOSTERS. ALL PRICES SUBJECT TO CHANGE. LAST UPDATED 3/2019 </p> <div style="background-color: #E67E22; color: white; padding: 5px; margin-bottom: 5px; text-align: center;"> ADDITIONAL SERVICES </div> <table style="width: 100%; border-collapse: collapse;"> <tr><td>Microchip Pet ID (With Lifetime Reg.) Limited availability in Florida</td><td style="text-align: right;">\$19</td></tr> <tr><td>Nail Trim/Grind Limited availability</td><td style="text-align: right;">\$20</td></tr> <tr><td>Heartworm/Lyme Combo Test</td><td style="text-align: right;">\$31</td></tr> <tr><td>FeLV/FIV Test</td><td style="text-align: right;">\$35</td></tr> <tr><td>Fecal Test (Intestinal Parasite Screening)</td><td style="text-align: right;">\$29</td></tr> <tr><td>Domestic Health Certificate Please Call In Advance</td><td style="text-align: right;">From \$75</td></tr> <tr><td>Roundworm Deworm</td><td style="text-align: right;">\$19</td></tr> <tr><td>Tapeworm Deworm (Dosage Based on Weight)</td><td style="text-align: right;">From \$29</td></tr> <tr><td>Parvo/Distemper Titer (Qualitative ELISA)</td><td style="text-align: right;">\$65</td></tr> <tr><td>Rabies FAVN Titer Please Call In Advance</td><td style="text-align: right;">\$255</td></tr> </table>	PureVax Rabies	\$33	3in1 (FVRCP)	\$33	Feline Leukemia (FeLV)	\$33	Microchip Pet ID (With Lifetime Reg.) 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For locations with nail trimming, visit our website. Operated by vip·petcare Mobile Clinics vippetcare.com | 1.800.427.7973

Community Clinics: Wellness Center Incubator

We Succeed When We Convert Community Clinics To Wellness Centers



MOBILE CLINICS



The Pet Owner



The Community



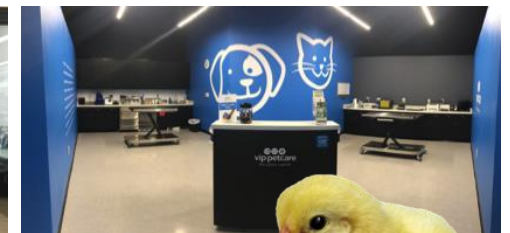
The Location



Services

Learnings Are Captured & Optimized

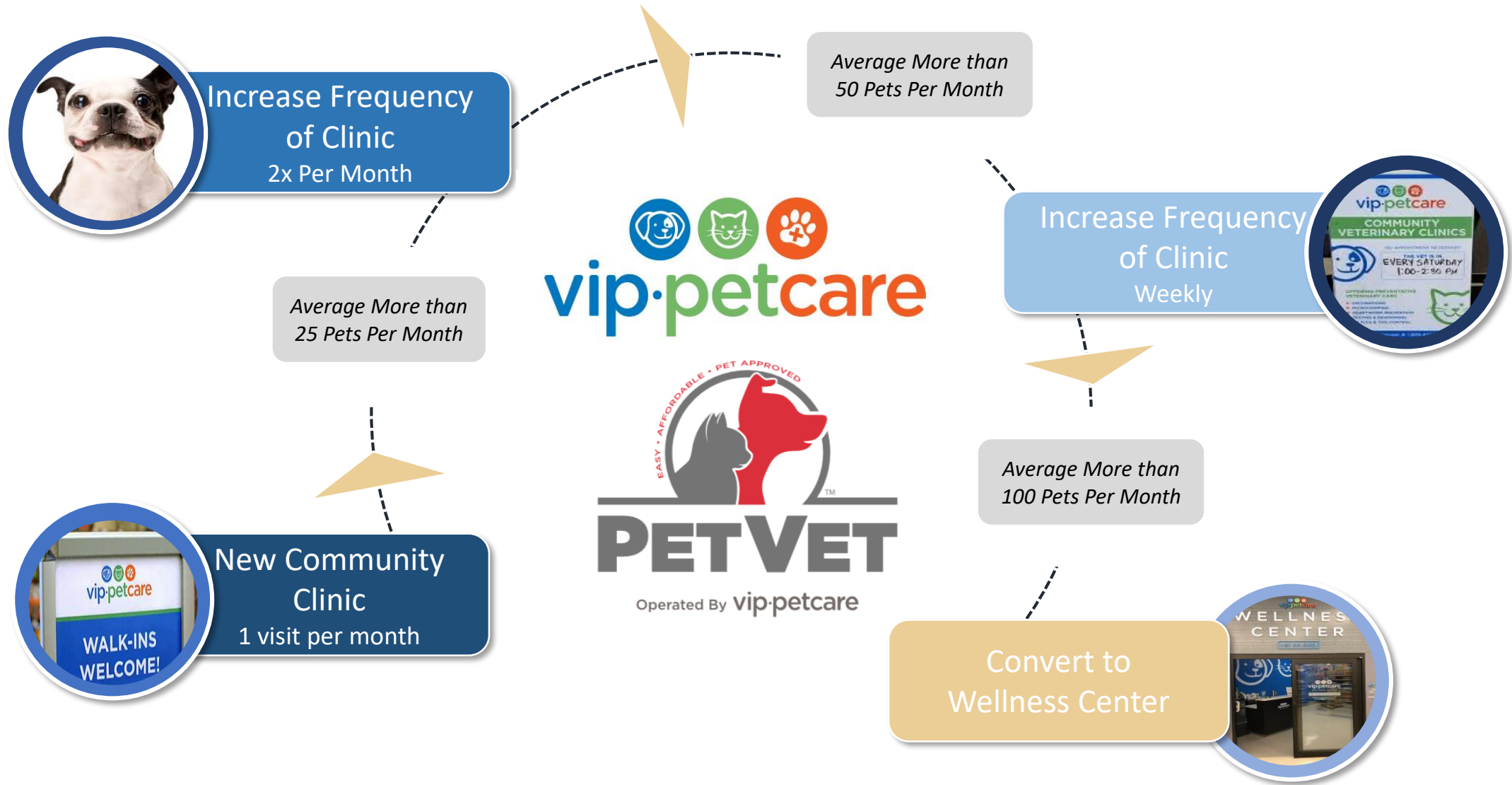
Learnings Are Used To Customize The Centers To The Community



WELLNESS CENTERS



Growth Cycle...From Community Clinic to Wellness Center





WELLNESS CENTER OPENING & PROMOTIONAL MODEL



PETIQ Services Brands

MASS RETAILERS

Wellness Centers Only



PET SPECIALTY AND OTHERS

Mobile + Wellness Centers



TRACTOR SUPPLY

Mobile + Wellness Centers



Wellness Center Service Offered

- Everything in mobile clinics



- Minor illness care (ear, eye, etc.)
- Physical Exams
- Skin scrapes
- Health panels



LAST UPDATED 3/2019

\$90 Wellness Package
Complete Physical Exam & Blood Panel Screen
1/2 OFF any Vaccine Package During Same Visit

\$110 Senior Wellness Package
Complete Physical Exam & Senior Blood Panel Screen - Includes Urinalysis
1/2 OFF any Vaccine Package During Same Visit

Puppy Pack 1 3in1, Deworm, Fecal Test \$65	Puppy Pack 2 3in1+Lepto 4, Nasal Bordetella, Deworm (Add Fecal Test...\$15) \$75	Puppy Pack 3 3in1+Lepto 4, Injectable Bordetella, Deworm (Add Fecal Test...\$15) \$75	Dog Pack 3in1+Lepto 4, Bordetella, Fecal Test \$80
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K9 Influenza Pack - \$40

Kitten Pack 1 3in1, Deworm, Fecal Test \$55	Kitten Pack 2 3in1, FeLV Deworm (Add Fecal Test...\$15) \$65	Kitten Pack 3 3in1, FeLV, PureVax Rabies, Deworm (Add Fecal Test...\$15) \$75	Cat Pack 3in1, PureVax Rabies, Fecal Test (Exposed to Outdoor Cats Add FeLV...\$25) \$75
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Minor Illness Packs - \$55 each

<p>Ear Package</p> <p>Skin Package</p> <p>Eye Package</p> <p>Urinary Package</p> <p>GI Upset Package</p>	<p>All Minor Illness Packages Include the following</p> <ul style="list-style-type: none"> • Exam by our licensed veterinarian • Basic diagnostics & recommended treatment • Prescription for medication (if needed)
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+ K9 Rabies to any Pack - \$15

+ K9 Heartworm/Lyme Combo Test to any Pack - \$18

+ Blood Panel Screen to any Pack - \$55

+ Senior Blood Panel Screen to any Pack - \$90

CANINE: INDIVIDUAL VACCINES		FELINE: INDIVIDUAL VACCINES	
Rabies	\$20	PureVax Rabies	\$35
3in1 (DA2P + Parvovirus)	\$35	3in1 (FVRCP)	\$35
Bordetella	\$35	Feline Leukemia (FeLV)	\$35
Leptospirosis (4-way)	\$35		
Lyme	\$35		
Rattlesnake - Available Regionally	\$40		

PACKAGE PRICES DO NOT INCLUDE FEES FOR BOOSTERS. ALL PRICES SUBJECT TO CHANGE.

ADDITIONAL SERVICES	
Microchip Pet ID (with Lifetime Reg.)	\$20
Physical Exam	\$45
Physical Exam + Health Certificate	\$90
Domestic - Please Call In Advance	\$90
International - Please Call In Advance	\$215
Well Pet Exam (Free with any Vaccine Pack)	\$25
Vetscreen, Blood Panel Screen	\$65
Senior Profile Blood Screen	\$105
Nail Trim	\$20
Roundworm Deworm	\$25
Tapeworm Deworm (Dosage Based on Weight)	From \$30
Fecal Test (intestinal Parasite Screening)	\$30
Heartworm/Lyme Combo Test	\$25
FeLV/FIV Test	\$43
Parvo/Distemper Titer	\$65
Rabies FAVN Titer - Please call in advance	\$255
Anal Gland Expression	\$20

\$1 Medical Disposal Fee Per Pet

New Wellness Center Roadmap



Pre-Launch (-3 to 0 Months)

Launch (0 to 3 Months)

Post-Launch (3 to 18 Months)



New Wellness Center Roadmap

Activities Leading up to the Launch of a New Location

Pre-Launch
(-3 to 0 Months)

Launch
(0 to 3 Months)

Post-Launch
(3 to 18 Months)

Construction



Staffing & Training



VETIQ
Smarter Pet Health™
VETIQ
Wellness Center
Opening
Playbook

Soft Open



GO TEAM



ONEIQ
University

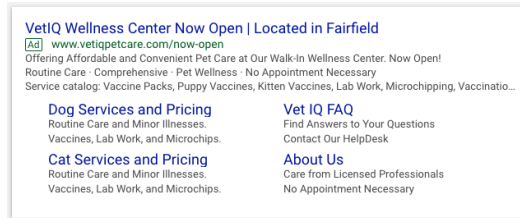
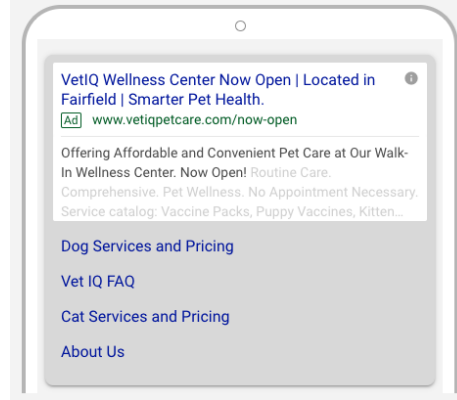


New Wellness Center Roadmap

Activities to Launch and Support a New Location

- Pre-Launch**
(-3 to 0 Months)
- Launch**
(0 to 3 Months)
- Post-Launch**
(3 to 18 Months)

Digital Marketing



Grand Opening



New Wellness Center Roadmap

Brand Support Tailored to Each Customer

Pre-Launch
(-3 to 0 Months)

Launch
(0 to 3 Months)

Post-Launch
(3 to 18 Months)

WALK-INS WELCOME At any VIP Petcare Community Clinic or Wellness Center

vip-petcare
PREVENTIVE VETERINARY CARE

\$10 OFF Any Vaccine Package

vip-petcare
PREVENTIVE VETERINARY CARE

ENTER NOW MATEY!

vip-petcare
31 Days of Halloween
PET COSTUME PHOTO CONTEST

vip-petcare

October is Pet Wellness Month!

There's no better way to celebrate than to treat your pet to a healthy, happy lifestyle.

Stop in to any VIP Petcare Wellness Center or Community Clinic and receive **\$10 off a wellness package* or vaccine package, plus get a free bandana.****

GET VOUCHER

*Only available at Wellness Centers
**With purchase of a wellness package or vaccine package, while supplies last

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helpdesk@vip-petcare.com or call us 1.800.427.7973

VIP Petcare®, 5813 Skylane Blvd., Windsor, CA 95492, United States
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October is Pet Wellness Month!

Do you have a wellness plan in place for your pet? Now is a great time to reevaluate your pet's health. Start by making a plan to ensure your pet is in tip-top shape for the year. Stop by your neighborhood VIP Petcare location to get your pet checked out. **No appointment necessary, just drop in!**

\$10 off any vaccine package plus get a free bandana*!

*with purchase of a vaccine package, while supplies last.

GET VOUCHER

Vaccines For Your Pet

Vaccinations help protect pets from diseases such as rabies, distemper, parvovirus, Bordetella, feline leukemia, influenza and more. And depending on the age of your pet, their lifestyle, where you live, specific health concerns and disease risks or travel plans, your pet will need a variety of vaccinations throughout the year. Getting onto a schedule will help ensure your pet is protected.

I'm paws-itive you'll love it here!

1 | Preventive Care



New Wellness Center Roadmap

Brand Support Tailored to Each Customer

Pre-Launch
(-3 to 0 Months)

Launch
(0 to 3 Months)

Post-Launch
(3 to 18 Months)



31 Days of Halloween
PET COSTUME PHOTO CONTEST

DEVILISHLY GOOD DAILY PRIZES!

PET VET CLINIC
Operated By vip-petcare

PET VET CLINIC
operated by vip-petcare

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PetVet Pet Wellness Centers | Affordable Pet Care
petvet.vipetcare.com/Fredericksburg
Providing Affordable High Quality Pet Wellness Care in Your Local Tractor Supply Co. Get \$10 Off Any Vaccine or Wellness Package Through December 2, 2019!

Canine Services View Our List of Affordable Pet Care Services for Dogs. PetVet FAQ Browse Our FAQ for Answers to Commonly Asked Questions	Feline Services Check Out Our List of Affordable Pet Care Services for Cats. Resource Center Get Information on a Variety of Pet Care Topics
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October is Pet Wellness Month!

Do you have a wellness plan in place for your pet? Fall is a great time to set up a routine to follow for your pet's health before the holiday rush. Start by making a plan for your pet's health to ensure they are protected for the year. **No appointment necessary, just drop in!**

\$10 off any vaccine package plus get a free bandana!* **GET VOUCHER**

*with purchase of a vaccine package, while supplies last.

Vaccines For Your Pet

Vaccinations help protect pets from diseases such as rabies, distemper, parvovirus, Bordetella, feline leukemia, influenza and more. And depending on the age of your pet, their lifestyle, where you live, specific health concerns and disease risks or travel plans, your pet will need a variety of vaccinations throughout the year. Getting onto a schedule will help ensure your pet is protected.

October is Pet Wellness Month!

PET VET CLINIC
Operated By vip-petcare

31 Days of Halloween
PET COSTUME PHOTO CONTEST

BE SUPER, ENTER NOW!

PET VET CLINIC
operated by vip-petcare

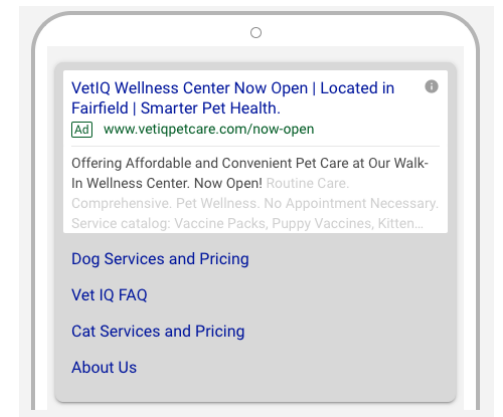
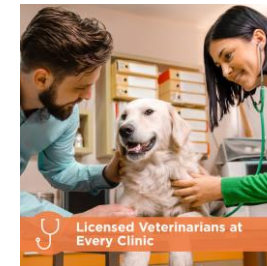
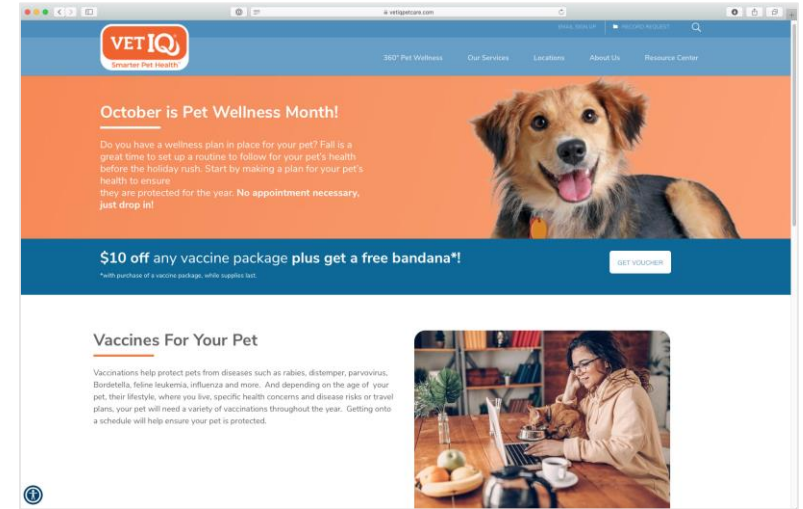
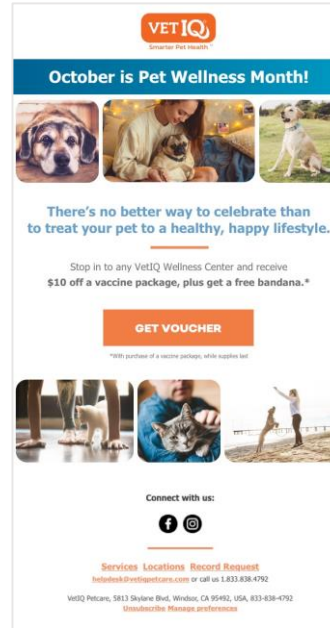
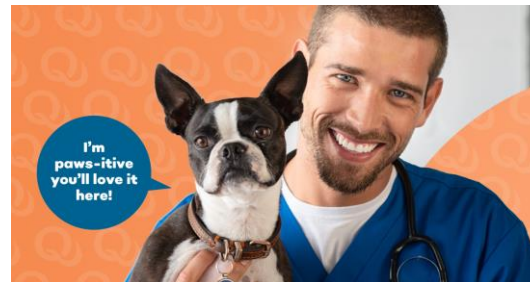
New Wellness Center Roadmap

Brand Support Tailored to Each Customer

Pre-Launch
(-3 to 0 Months)

Launch
(0 to 3 Months)

Post-Launch
(3 to 18 Months)



Optimizing Social, Display & Search Daily

Social

Facebook Ad: VIP Petcare Sponsored. You don't have to choose between quality and convenience when it comes to preventive veterinary care for your pets - walk-ins are welcome at every #VIPPetcare Community Clinic, and a licensed veterinarian is always on site! #HealthyHappySafe

Instagram Ad: vip_petcare Sponsored. Summer is winding down, and so is our photo contest. But don't worry, there's still time to enter! Visit our page for details ...See More

Facebook Ad: VIPPETCARE.COM Walk-Ins Welcome! No appointments necessary

Instagram Ad: vip_petcare Sponsored. At any VIP Petcare Community Clinic or Wellness Center

- Paid Social running on Facebook & Instagram
- Remarketing: web visitors and email recipients
 - Promo offer and educational content
- Prospecting: pet lovers, related interests, and lookalike audiences
 - Receiving brand awareness and educational content

Display

WALK-INS WELCOME At any VIP Petcare Community Clinic or Wellness Center

\$10 OFF Any Wellness or Vaccine Package

WALK-INS WELCOME At any VIP Petcare Community Clinic or Wellness Center

\$10 OFF Any Wellness or Vaccine Package

- Remarketing: website visitors within the last 90 days
 - Promo and educational focused creative
- Prospecting: pet lovers, related interests and lookalike audiences
 - Brand Awareness focused creative

Search

VIP Petcare® Veterinary Clinic | No Appointment Necessary | Convenient Locations
vipetcare.com/find-a-clinic/search

High Quality Pet Care from Licensed Vets. Find a Clinic Near You! Keeping Pets Healthy, Happy, and Safe™
 Affordable Services. Convenient Locations. Comprehensive. No Appointment Necessary. Service...

[Find A Clinic](#)
[Services & Pricing](#)
[Microchipping](#)
[Pet Pharmacy](#)

Call (800) 427-7973

VIP Petcare® | Low Cost Veterinary Services | No Appointment Necessary
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Affordable Services · Convenient Locations · Comprehensive · No Appointment Necessary
 Service catalog: Vaccination Packages, Microchipping, Preventive Pet Care, Pet Wellness Care, Nail Tr...

[Find A Clinic](#)
 Walk-ins Welcome
 No Appointment Necessary!

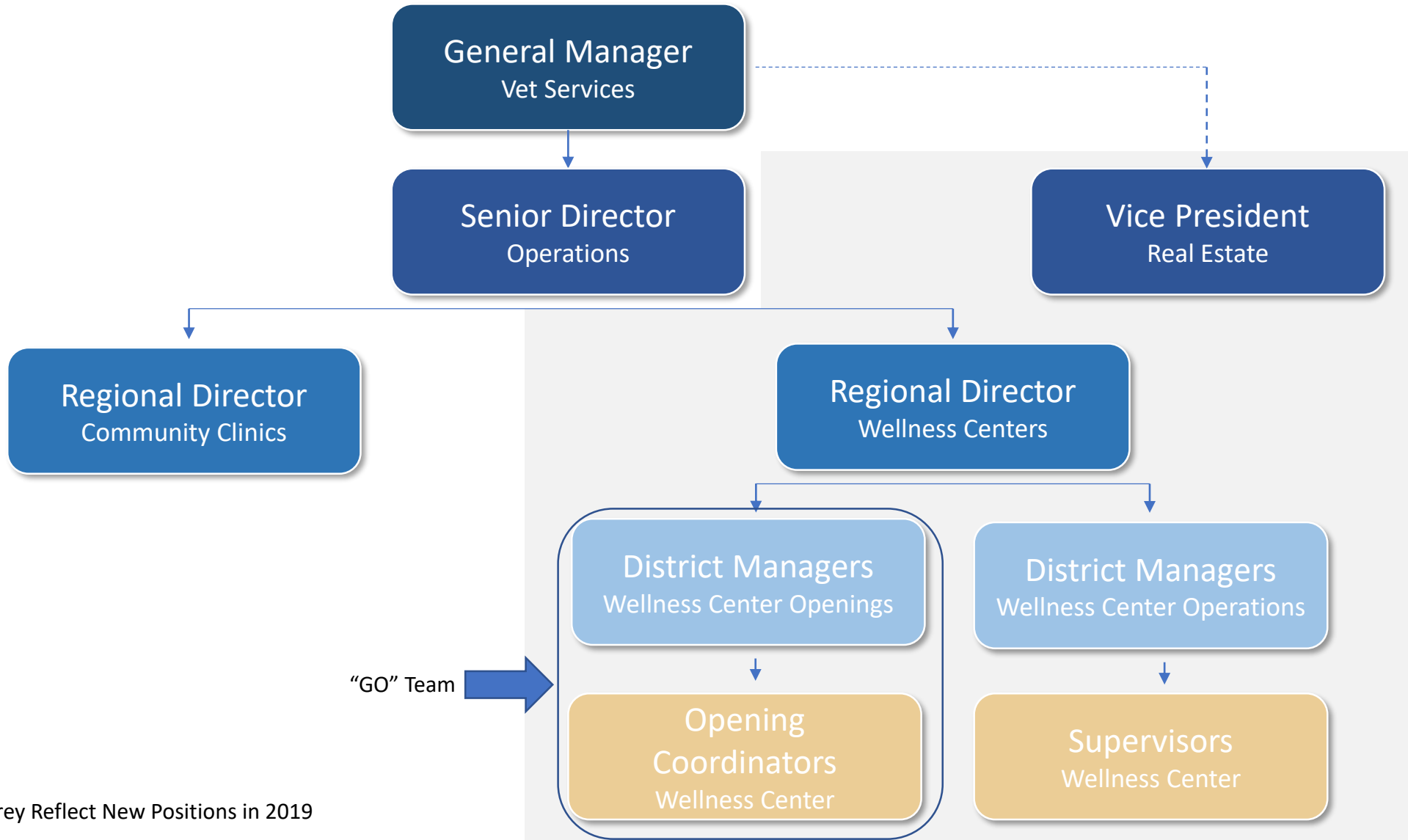
[Services & Pricing](#)
 Check Out the Services Available at Your Local VIP Community Clinic

[Microchipping](#)
 Chipped Pets are 2.5X More Likely to be Returned to Their Owners

[Pet Pharmacy](#)
 Refill Or Fill Prescriptions Online
 Browse For Medication & More.

- Brand campaigns
 - Including brand-specific keywords like "VIP Petcare", "PetVet Tractor Supply"
- Non-Brand campaigns
 - Including ad groups for various services like vaccinations, microchipping, minor illnesses as well as industry-specific

Resources Are In Place To Scale Wellness Centers



 Area in Grey Reflect New Positions in 2019



WELLNESS CENTER EXPANSION UPDATE



Progress on New Wellness Centers for 2019



TOTALS

	Walmart	meijer	TSC	PET SUPPLIES PLUS	pet food express	TOTALS
Opened Year to Date	10	4	1	0	4	19
Remaining to Open in 2019	25	10	20	6	0	61
Total to Open in 2019	35	14	21	6	4	80
In Operation by End of 2019	55	14	25	9	11	114

2019 Wellness Center Locations



Pre-2019

2019

5-Year Plan

- Created working team to determine strategy, rollout plan, and resource needs to open 1,000 Wellness Centers by 2023
- Four sub teams* created focused on:
 1. Partner strategy and rollout timeline
 2. Key roles and organization structure
 3. Resource requirements and costs
 4. Processes needed to build and open wellness centers



**separate from GO team*

PET IQ[®]
Smarter Pet Health

