ORBIT

Find your people.
Find your Orbit.

The demand & living-experience layer for co-living — a two-sided, compatibility-matched marketplace on one shared record.

INVESTOR OVERVIEW · 2026

IT STARTED IN A BASEMENT

7 rooms. 1 philosophy.

In 2025, Tiffany converts a 3/2 into a 7/4 — adding rooms to a single-family home to begin a co-living experiment built on **intentional spaces and thriving community**.

Then Jake arrives — traveling for work, done with hotels and Airbnb fees. Reliable, communicative, income-stable. Not random at all: exactly what Tiffany was screening for without knowing it. He makes it home.

1 → 7

rooms, from a single conversion — the first Orbit before it had a name

No workshop or pizza night fixes a mismatch. Compatibility does.

THE PROBLEM · LONELINESS

This isn't a housing problem. It's a connection problem.

50%

of U.S. adults report feeling lonely.
U.S. Surgeon General, 2023

75%

of Gen Z & Millennials describe themselves as lonely — and they land cold in new cities on shift schedules.
Cigna / GWI

2

options in the market today: live alone, or gamble on a random roommate. Nothing forms a compatible household on purpose.

THE INSIGHT

The household is the product — not the room.

Random matching treats the room as the product. Orbit treats the **household** as the product — and makes *forming one* a coordinated, low-friction, safe process.

TODAY

Live alone

Isolation, and the full cost of a place on one income.

TODAY

Random roommate

A gamble on sleep, safety, and whether it lasts.

Orbit

The household you'd choose

Vetted, compatible, formed on purpose — and full.

THE MODEL · A TWO-SIDED PLATFORM ON ONE SHARED RECORD

Residents bring fit. Operators bring the homes — and pay to fill them.

RESIDENTS · THE SUPPLY OF FIT

They bring how they live and who they are.

They get the household they'd choose — vetted, compatible, theirs. Free to residents.

Orbit · the platform

- **Verify** — identity + background
- **Match** — lifestyle compatibility
- **Backfill** — keep the home full

OPERATORS · THE PAYING CUSTOMER

They bring the homes — and pay to fill them.

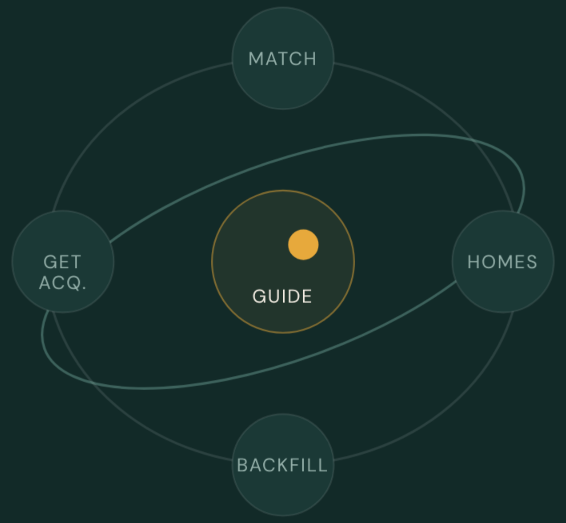
They get full homes that stay full with qualified residents who get along.

Orbit is the operator-paid platform for **household formation & occupancy continuity**. Memberships, payments, and "Orbit-for-Life" are later expansion.

THE FLOW · NOT A FUNNEL

The flow is an orbit — not a funnel.

- **Nonlinear** — enter at any arc. Start as an organizer assembling a group, or a joiner who meets one person first. There's no fixed step 1.
- **Iterative** — people and homes move together. A saved home surfaces a housemate; a new member changes which homes fit; backfill keeps it whole.
- **Guided** — the Orbit Guide reads where you are and hands you the single next best move. The loop is rich; the experience feels like a few easy taps.



THE PRODUCT · FIND YOUR PEOPLE

Your people appear.

A 60-second intake, then compatible housemates — ranked by fit, with the reasons why.

- Ranked on lifestyle fit — **wake hours, cleanliness, noise, socializing**. Never income, credit, or protected class.
- "Why you match" on every card — one tap to propose someone to your group.
- Cues, not scores — timeline overlap and pets show as chips, never inside the match.

Near UTSW | Shift-friendly | Verified only

Amara Okafor
Travel nurse · early bird
EARLY BIRD | TIDY
95% FIT

Devon Reyes
ER nurse · nights
FLEXIBLE | QUIET
91% FIT

Kai Thompson
Resident · Children's
TIDY | SOME GUESTS
88% FIT

THE ONE TAP

Approve a whole household — in a single tap.

A compatible, identity-verified group arrives ready to place. The operator approves the **household**, not six separate applications.

Approving hands them to the operator's leasing process; each member then screens in the PM tool. Orbit introduces and verifies — the operator screens and leases.

Explore the working prototype mybestorbit.com ↗

The Crew
2213 Swiss Ave, Dallas · 6-bed

93%
HOUSEHOLD FIT

$1,000
rent / room

$6,000
gross rent / mo

$480
Orbit fee (8%)

✓ ALL 6 IDENTITY-VERIFIED · 6 OF 6 FILLED

✓ Approve group

WHERE ORBIT STOPS · THE BOUNDARY

Orbit's role ends at introduction — it never touches rent or deposits.

Orbit owns

- Identity + lifestyle verification
- Compatibility matching
- Group formation & one-tap approval
- Backfill & occupancy continuity

→

Approval hands the placed Orbit to the operator's PM system.

OPERATOR / PM TOOL OWNS

- Credit / income / criminal / eviction screening
- Lease, e-sign & deposit
- Rent, banking & ledgers

The **8% fee is billed to the operator**, never to residents. Orbit stays the matching + coordination layer — not a property manager, landlord, or lease-holder.

WHY IT COMPOUNDS · BACKFILL + FLYWHEEL

When someone leaves, the room doesn't go cold.

01

A full home

matched, vetted, fully leased

02

A room opens

one resident's rotation ends

03

Backfilled

next compatible person from the waitlist

108–112%

Home NRR — modeled target. Backfill turns resident churn into revenue continuity.

The demand flywheel: **density** qualifies demand around each home → **full, compatible homes** earn premium per-room rent → Orbit takes a share of the uplift it creates.

THE LANDSCAPE

Everyone owns a piece — Orbit runs the full loop.

	Flow	Outsite	PadSplit	Orbit
What they own	The buildings	The network	Room supply	The full household loop
Solves	Where you live	Where nomads stay	A cheaper room	**WHO you live with**
Model	Owned real estate	Membership network	Room marketplace	Asset-light, two-sided
Optimizes for	Design & brand	Community & travel	Lowest all-in price	Fit & safety

Buildings, network, price — each rival owns one lever. Orbit runs the whole loop around a **persistent household record** — asset-light and defensible on the system, not one feature.

POSITIONING · PARTNER, DON'T COMPETE

PM platforms are the distribution channel — not the competition.

Orbit sits **on top of** the PM stack and hands off — it never rebuilds it. Operators bring filled rooms and occupancy, which is accretive to the platforms they already run.

RentecDirect | AppFolio | TurboTenant | RentRedi

Their operator base becomes a **distribution channel** — de-risking "how do you get operators." Roommate compatibility + two-sided demand is a consumer/marketplace competency, not PM SaaS.

WHY NOW · THREE TAILWINDS, ONE CATEGORY MOMENT

The forces are converging. No one has built the marketplace to meet them.

1 · AFFORDABILITY

83%

of renters under $30K are cost-burdened. The $45–75K band jumped to 49% (+9.5 pts since 2019) — the fastest-growing group.

2 · STR REGULATION

85%

collapse in NYC's legal short-term listings under Local Law 18. Hosts pivot to 30+ day stays.

3 · MARKET MOMENTUM

$24.4B

global co-living market by 2033 (13.5% CAGR), led by working professionals — 80–90% occupancy for premium co-living.

Harvard JCHS, America's Rental Housing 2026 · AEI, NYC Local Law 18 Analysis, 2026 · AirDNA, U.S. STR Mid-Year Outlook, 2026 · SkyQuest / Mordor Intelligence, Co-Living Market, 2026.

BUSINESS MODEL · HOW ORBIT EARNS, PER HOME, PER MONTH

One line of revenue: an 8% take-rate on collected rent.

Gross collected rent	Orbit take-rate	Orbit revenue / home / mo
$6,000	8%	$480
6 tenants × $1,000 / mo	of collected rent	the entire base model

Reproducible with a calculator. Operator software, resident memberships, payment processing, and "Orbit-for-Life" are **optional upside — not modeled**. We underwrite the 8% fee alone.

ORBIT

OWNER ECONOMICS · MODELED

+39% more to the owner — net of Orbit's fee.

Revenue uplift after Orbit's fee and modeled co-living operating cost. Lead with the net number.

$4,320 vs $3,100 standard lease — net of -$1,200 modeled co-living opex. Cost lines modeled until measured.

GO-TO-MARKET · SIGN OPERATORS, NOT ROOMS

A Texas cluster — Dallas → Houston — built operator by operator.

THE WEDGE · PORTFOLIO

~5

anchor operator relationships bring blocks of homes — vs ~310 one-at-a-time sign-ups. Front-loads revenue; pulls the milestone forward ~3 months.

THE DEMAND · CLINICAL-LED

~70%

women in the observed segment. Hospital systems & travel-nurse agencies create compatible, qualified density around each home cluster.

WHAT WE UNDERWRITE

Room-open demand

Qualified, compatible residents arriving the moment a room opens — exactly what the Texas launch is designed to prove.

Trade-off we manage: concentration risk — keep an organic floor underneath the anchors.

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THE PLAN · A SCENARIO, NOT A FORECAST

The path to ~$150K MRR.

Orbit's recurring take, Dallas → Houston — a modeled ramp on the 8% fee alone.

- **~313 homes** — $150K MRR ÷ ~$480 / home / mo
- **2 metros · 1 state** (TX) · ~April 2028
- **~110% Home NRR** (modeled) · ~70% women (expected)

SCENARIO · MODELED

~$150K

MRR — cash-flow positive across Dallas + Houston.

Then the next round is a choice, not a lifeline.

THE UPSIDE · WHY THIS IS A CATEGORY

Every sharing-economy category has a winner. Housing's community layer doesn't — yet.

Asset-light & compounding

A two-sided marketplace on a persistent record — the demand flywheel strengthens every match and Orbit earns a share of the value it creates.

A defensible loop

Rivals own one lever — buildings, network, or price. Orbit owns the full formation-and-backfill loop, the part none of them run.

The inflection

At ~$150K MRR, cash-flow positive, Orbit is a proven book — the point where an asset-light category leader's economics start to compound.

Illustrative of category dynamics, not a projection of returns. All investments involve risk.

THE ASK · A STAGED RAISE THAT TRACKS THE RISK

Milestone-gated tranches — software first, working capital as operators sign, debt after collections.

STEP 1 · SAFE TRANCHE

~$750K

Build & launch.

Ship platform v1.0; launch Dallas; sign the first anchor operators.

STEP 2 · MILESTONE CLOSE

~$1.25M

Scale the cluster.

Fill Dallas + launch Houston toward the ~$150K MRR scenario. Rolling closes.

STEP 3 · AFTER COLLECTIONS

Revenue-based debt

Fund the proven book.

Home-level working capital & backfill, off recurring revenue — non-dilutive.

Tranche sizes illustrative — the staging is the point. Software is funded up front; home-level capital releases against signed operators and occupied rooms.

ORBIT

THE TEAM · BUILT BY PEOPLE WHO'VE LIVED IT

Jacob Whitfield

CEO

Built two tech startups from zero to major scale — now leads Orbit's raise, product, and go-to-market.

Tiffany Fulton

COO

Runs a real co-living business and lived the operator pain firsthand — Orbit's proof of concept and first customer.

John Hancock

CTO

Ships the Orbit product end-to-end on a modern agentic stack — and brings his own build team to turnkey it.

Real estate's next chapter is community.

Every sharing-economy category has a winner. Housing doesn't — yet. Get in early.

See the working prototype mybestorbit.com ↗

jacob@orbitliving.io · Find your people. Find your Orbit.