

Award-Winning Western Canadian College Group Health Care Aide, Wellness, Beauty (No. 36658)



Executive Overview

Halladay Education Group has been engaged as exclusive advisor for the sale of a multi-campus private career education platform in Western Canada, offering immediate scale, geographic diversification, and operating leverage. Built on an established regional brand, the company combines a strong market reputation with a capital-efficient leased-campus footprint. The platform is concentrated in resilient end markets, primarily beauty and wellness and healthcare support, with a predominantly domestic student base, supported by standardized operations, employer-aligned training, and a model that converts incremental seat utilization into earnings.

FY2026F revenue is projected at \$6.60M with \$2.60M adjusted EBITDA (39% margin), versus FY2024 revenue of \$5.12M and adjusted EBITDA of \$1.23M (24% margin). FY25F reflects interim timing and mix dynamics (including enrollment ramp timing); and the key operating drivers and normalization bridge will be detailed in the CIM drivers and the normalization bridge will be provided in the CIM. Enrollment is expected to reach the mid-700s by FY2026F, supported by throughput in advanced and clinical esthetics, consistent demand in healthcare support, and a contracted high-school dual-credit pipeline.



Core Investment Thesis

- **Scaled, Defensible Western Canada Platform** multi-campus footprint under a premium brand, supported by centralized admissions/marketing and standardized delivery.
- **Regulatory Moat & Pricing Resilience** provincially licensed, student-aid eligible, and DLI maintained for selective international student optionality.
- **Capex-Light Operating Leverage** leased-campus footprint, shared services, standardized SOPs, and rolling intakes convert capacity into earnings with minimal incremental capital.
- **Proven Unit Economics & Cash Conversion** Historical adjusted EBITDA margins have been in the low- to mid-20% range, with FY2026F expanding to approximately 39%. Adjusted EBITDA per student is expected to increase meaningfully by FY2026F, reflecting improved mix, operating leverage, and normalization.

- **Visible Growth Runway** healthcare cohorts, deeper clinical esthetics, and contracted dual-credit partnerships support near-term upside and medium-term scalability.
- **Favourable End-Market Exposure** concentrated in healthcare support, esthetics, and vocational training categories tied to durable employer demand, practical outcomes, and relatively short program duration, supporting enrollment resilience and repeatable cohort formation.

Performance Snapshot

| Metric | FY24 | FY25F | FY26F |
|------------------------|----------|---------|---------|
| Total Revenue | \$5.120M | \$5.15M | \$6.60M |
| Adjusted EBITDA | \$1.23M | \$1.08M | \$2.60M |
| Adjusted EBITDA Margin | 24.0% | 21.1% | 39.4% |
| Enrollment | 412 | 572 | 682 |



Investment Highlights and Financial Profile

- **Institutional Reputation and Regulated Model:** A long-standing brand in a regulated environment delivering stable cash flows and consistent pricing discipline.
- **Now → Trajectory:** From \$5.12M of revenue and \$1.23M of Adjusted EBITDA (24% margin) in FY2024 to \$6.60M of revenue and \$2.60M of Adjusted EBITDA (39% margin) in FY2026F.
- **Predictable Pipeline:** Contracted dual-credit partnerships include committed volume, supporting recurring off-peak starts and improving intake visibility; details to be provided in the CIM.
- **Regulatory Standing:** Provincially licensed and student-aid eligible; DLI maintained. No known notices or adverse findings. Renewal/inspection cadence and dates to be provided in the CIM.
- **Domestic Demand Profile:** International enrollment is near-zero, and results are predominantly domestic, insulating the business from potential federal changes to international student visa policy and cap levels; details will be provided in the CIM.

Value Proposition

The brand's reputation, placement results, and employer connections generate lasting value that is difficult to replicate. The regulatory environment is strong: provincially licensed, eligible for student aid, and maintaining DLI status to ensure ongoing access to selective international options. The footprint is capital-efficient and easy to integrate, featuring standardized equipment, documented curricula,

shared services, and rolling intakes that increase utilization and margins without significantly raising fixed costs. In a fragmented private career college market with many undercapitalized providers, this platform is financially stable, scalable, and immediately cash-flow positive, with clear short-term potential to boost growth for strategic consolidators and sponsors.



Transaction Overview & Process

- **Asset:** 100% equity interest in a Western Canada, multi-campus private career college group.
- **Buyer Profile:** strategics and sponsors with experience in education/services or multi-site healthcare.
- **Access:** NDA required for CIM, detailed financials, KPI dashboards, campus summaries, and management meetings.
- **Management Experienced Team** post sale.
- **Facilities Long-term Lease** arrangements (no ownership transfer).

Next Steps

Qualified parties are invited to sign an NDA to obtain the comprehensive Confidential Information Memorandum and to arrange management presentations.



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