



SchoolsForSale, Inc.

Where Education is our *Specialty*

Redefining
Opportunity for

Educators



Brokerage | Advisory | Real Estate



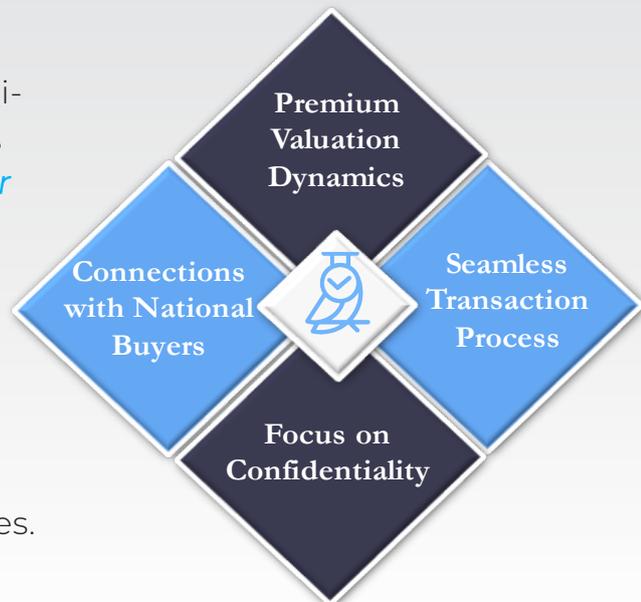
About SchoolsForSale, Inc.



SchoolsForSale is one of the leading brokerage dedicated to offering a full-range of advisory services for school providers in the private education sector. SchoolsForSale exists to serve as the rightful matchmaker for buyers and sellers in the educational community. Our unique team of trusted professionals bring an unparalleled level of sector experience and transactional experience to providers seeking to enter the next stage of growth with the sale of their school business and real estate.

SchoolsForSale was established **with** a group of experienced school operators and investment professionals who believed that they could provide *better customer service, market knowledge, transactional experience, and professional representations* while maintaining confidentiality than was currently available by “traditional brokers”.

Fueled by expertise and passion, SchoolsForSale provides *business development and brokerage solutions* to prepare school providers for what’s next in their lives.





www

What We **Do**



BROKERAGE

Our exclusive, market-leading selling process creates opportunity and unlocks the maximum value for your school business and real estate.



REAL ESTATE SERVICES

Our team provides a comprehensive suite of services related to the financing and acquisition of the school property through our real estate partners.



VALUATION ADVISORY

Discover how our exclusive valuation analysis confirms the value and highlights any of the performance elements which enhance the total economic valuation of your business



DEAL COORDINATOR

Our clients can expect a smooth sale and transition process with clearly defined transaction steps and timing expectations.



BUSINESS DEVELOPMENT

Leverage our knowledge base and operational expertise to improve your operations and enhance your value in preparation for a potential sale.



FINANCIAL ADVISORY

Our professionals deliver specialized, objective financial advice you need to clearly understand your options, opportunities and exposures

Leading **Brokerage & Advisory** in the
Education Industry

Why choose SchoolsForSale?

The process of selling a school is *unique*. Selecting a business broker who *understands the education sector* and its unique *transaction mechanics* is what separates SchoolsForSale from other traditional brokers. The founders of SchoolsForSale have over a decade's worth of transaction experience as a buyer on over \$150 million of private school across the nation. We are unique in our capacity to bring extensive financial, legal, managerial, and entrepreneurial experience to the table.

SchoolsForSale has the knowledge and experience to generate a *premium market value* and ensure a *seamless, confidential experience* for its clients. We offer the highest consulting, facilitation, and engagement services to exceed expectations.



✓ Premium Valuation

Under our guidance, SchoolsForSale can help maximize the sale proceeds of your business and real estate by handling the negotiation with top buyers willing to pay an all-cash premium.

✓ Connections with Buyers

Our founders at SchoolsForSale have built strong, direct relationships with the nation's top and most synergistic buyers. SchoolsForSale can guarantee a great fit at the best price. Our upfront efforts will accelerate the time to an agreement.

✓ Focus on Confidentiality

We understand the importance of maintaining confidentiality for both buyers and sellers and have developed consistent strategies to help ensure your transaction remains confidential from beginning to end.

✓ Seamless Transition

We advise school owners through the challenges of a sale, including handling the interaction with all third-party intermediaries, including legal councils, accountants, and other partners to ensure a smooth process for everyone.

✓ Deep Market Intelligence

There is no other broker that understands the market like SchoolsForSale does. SchoolsForSale keeps an active pulse of the market environment, and measures a potential sale against the underlying macro themes in the sector.

✓ Personalized Approach

We believe communication is extremely critical during the selling process. SchoolsForSale takes special care to create an open relationship with our prospective sellers - such as coaching and counseling them at each step of the selling process to minimize any surprises.

Education is our *only* **Specialty**

At SchoolsForSale, we believe in the *power of information* and thrive on *building relationships* with proven educators just like you. We are dedicated to helping successful school owners *realize their full potential upon the next phase of growth* in their lives. Our objective is to *bridge the gap* for “Mom and Pop” owners that lack the market knowledge and expertise to execute a strategic exit at a premium price.



Private School's #1 Go-To Broker



Through its active relationships, SchoolsForSale is able to secure the best price and fit with a national school operator that preserves the legacy forward!

Executive of a Top Operator



From start to finish, SchoolsForSale will pave the way for a successful transaction. It was great to work with a firm that understands the nuances of the school business.

Former School Owner



SchoolsForSale offers a one-stop shop for any seller seeking to sell their business with a great buyer. They take care of everything, and while keeping it confidential!

Former School Owner

Services Offered	SchoolsForSale	Traditional Broker	“Mom and Pop” School Owner
Proven valuation and market expertise in the private school sector	✓	✗	✗
Strong connections with the most experienced, education-focused buyers across the nation	✓	✗	✗
Focus on maintaining confidentiality by avoiding “shopping” your business to all buyers	✓	✓	✓
Coordinate all due diligence and closing processes to ensure a smooth transaction	✓	✓	✗
Offer real estate and financing solutions to buyers and sellers	✓	✗	✗
Leverage a proven “transition playbook” to ensure a successful hand-off	✓	✗	✗



Since 2004, our Team has transacted in excess of \$150 million of private schools; more than any other firm in the industry.



Our Goal is a Smooth Transition



Engagement

- Identify owner's needs and objectives
- Discuss current market conditions and buyer expectations
- Review timing and process steps
- Review representation agreement

Valuation Assessment

- Obtain preliminary operational and financial materials from the Owner
- Normalize the income statement to be consistent with industry standards
- Apply a multiple based on current market conditions to reach a valuation

Develop Marketing Strategy

- Gather materials and information about the business
- Identify strengths and growth opportunities
- Develop marketing strategy to attract interest from top buyers

Screen and Engage Buyers

- Screen and identify the most synergistic buyers
- Arrange on-site tours and schedule phone interviews
- Handle any questions or data exchanges confidentially

Evaluate Offers and Basic Agreement

- Facilitate negotiations on behalf of the seller
- Draft a preliminary letter of intent
- Arrange and conduct a buyer meeting upon LOI acceptance

Due Diligence

- Coordinate all due diligence process with the buyer and the seller
- Interact with all third party partners on behalf of the seller, including legal
- Resolve all issues that may come up through the process

Closing & Integration

- Coordinate all closing processes, such as licensing and legal disclosures
- Finalize all legal documents, including the purchase agreement
- Close and transfer funds!



What is my School Worth?

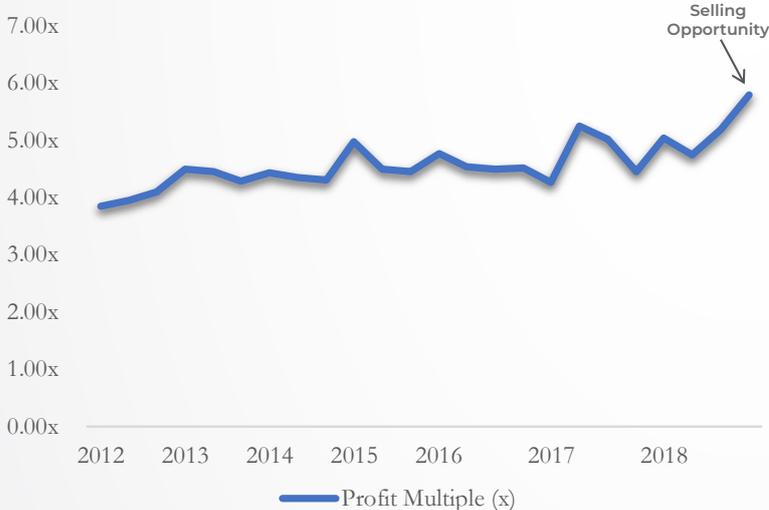
Private school owners invest their hearts and souls into their schools. But while most owners understand how to run and manage their program, they don't know the *actual value of the companies* they've built. This is where we come in.

Our in-depth valuation process starts with gaining more knowledge of your business, normalizing the business financials, identifying the value drivers, and concludes with taking a pulse of today's market conditions. For-profit school businesses are valued as a *multiple of EBITDA*, which is shorthand for business profit before interest, taxes, depreciation and amortization. EBITDA is used as a way to measure the business's "true" performances as it reveals the amount of its normal operational profit.

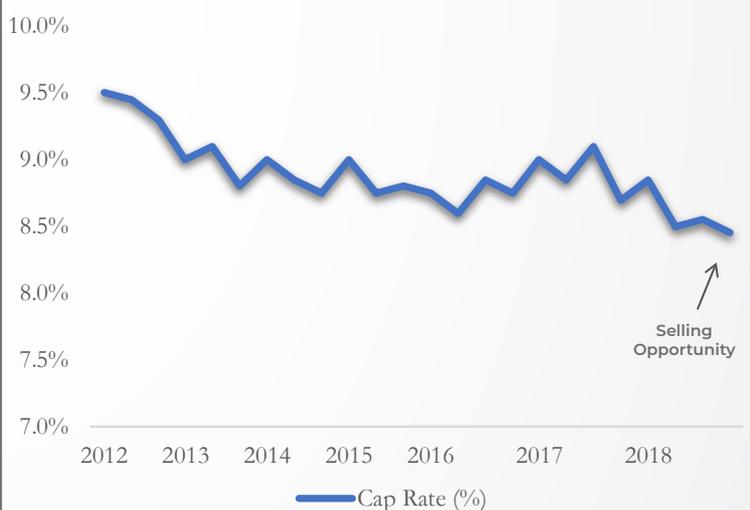
$$\frac{\text{True Profits / Earnings} \times \text{Industry Multiplier}}{\text{Business Value (\$)}}$$

$$\frac{\text{Fair Market Rent} \div \text{Industry Cap Rate}}{\text{Real Estate Value (\$)}}$$

Industry Trends: Multiple (x) on a School Business



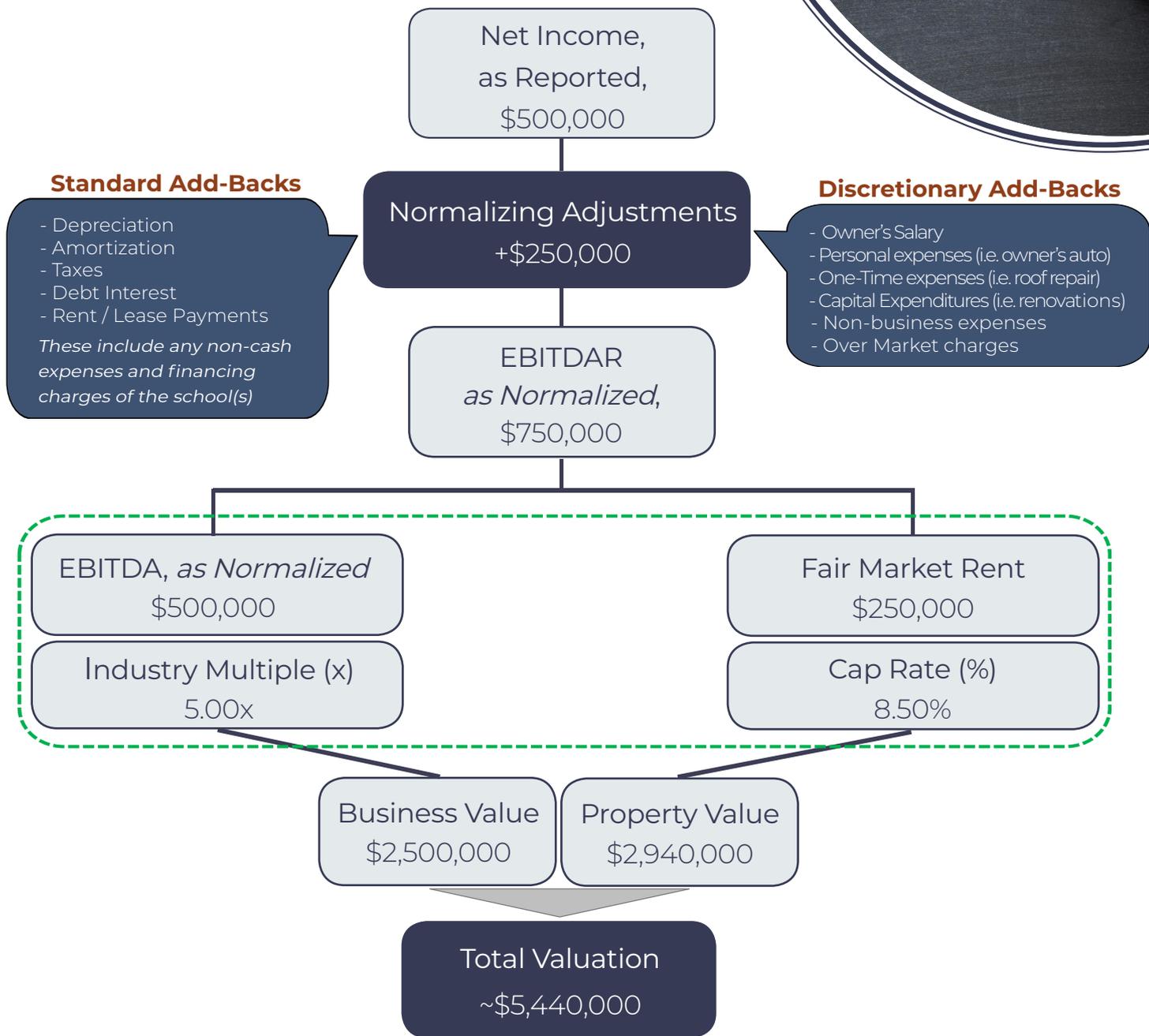
Industry Trends: Cap Rate on a School Property



Top Considerations for Driving School Value Multiple

# of Units	Program Quality	Market Dynamics	Profitability / Earnings	Growth Opportunities	Admin Team	Buyer Connections	Traditional Broker / Owner	Schools For Sale
> 3 Schools	Strong & Accredited	Strong Demos	Strong Contribution	Ability to Expand	Strong Leadership	Premier Network	~4.00x	~6.00x
1 School	State Approved	Average Demos	Low Contribution	None	Standard	Non-Specialized	~2.00x	~4.00x

Inside the Valuation Engine



To reflect the true underlying economics of the business, we “*add-back*” all non-cash charges and “*normalize*” EBITDA to account for certain discretionary expenses that are not expected to continue post-transaction.

SchoolsForSale offers the best path to uncovering all non-recurring and owner-related expenses to normalize EBITDA and improve the valuation of the business. Given our experience in the sector, SchoolsForSale will advocate the most aggressive valuation position to *maximize the Owner's sale proceeds* across its vast Buyer network.



SchoolsForSale



Call Dennis Mope
(407) 865-4385

Founder/Broker

www.SchoolsForSale.com