Social Services Staffing Agency

Sell-side engagement — Ontario

FINAL CLOSING PRICE

$515,000

14% below the $600,000 ask

Priced for the owner-dependency risk that sidelines most buyers, not against the business's proven value.

$1.38M	**7**	**1**
TRAILING REVENUE	MONTHS TO CLOSE	STRATEGIC BUYER, GTA

Structured around the risk.
Closed anyway.

The Situation

The business is a well-established staffing agency placing care professionals into developmental and behavioral support roles for children and families across Ontario. Clients included government-funded programs, non-profits, and private care providers, with decades of proven performance behind it. The owner was retiring and wanted a successor who would carry the agency's client relationships and mission forward, not simply strip the business for parts.

The Challenge

Agencies like this carry a familiar risk profile: the referral relationships and institutional trust built over decades sit largely with one person. That kind of owner dependency narrows the buyer pool immediately, and it gives any serious acquirer grounds to discount the price or walk away rather than underwrite a transition they can't control. The deal had to close on terms that priced that risk correctly for both sides, not paper over it.

> **1owner. 1point of failure.**
>
> The exact risk profile that makes most buyers walk.

The Structure

ZELD sourced a strategic individual buyer based in the Greater Toronto Area and built the deal around the risk instead of passing it. An extended transition period kept the seller engaged long enough for client and referral relationships to transfer properly, and an earn-out tied part of the consideration to the business performing after handover. The buyer wasn't asked to underwrite goodwill on faith, and the seller wasn't asked to accept a price that ignored the business's proven track record.

$85,000

BRIDGED BY STRUCTURE, NOT SACRIFICED

The Outcome

The engagement moved from listing to close in seven months and closed at $515,000, roughly 14% below the original $600,000 ask. The gap reflects the owner-dependency risk priced into the structure, not a failure to defend value; the transition and earn-out terms are what made a deal possible at all for a business this dependent on one operator.

> Why this matters for buyers
>
> Owner dependency is one of the most common reasons a good business never trades. ZELD's role isn't limited to sourcing opportunities; it includes structuring around the risks that stall or kill deals elsewhere, so qualified buyers can act on opportunities others pass on.

NEXT STEP

See what else is already in motion.

ZELD's active pipeline is shown to qualified buyers under NDA — this is the kind of deal it includes.

SCHEDULE A STRATEGY SESSION
Book Virtual Meeting Here.

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