Acquisition Opportunity – AI Visibility, Media Relations, and Search Marketing Agency with 40%+ Margin and ~50% YTD Growth

TobinLeff presents an opportunity to acquire a high-margin, fast-growing growth marketing agency that helps brands improve discoverability across search, media, and emerging AI-driven channels. Founded in 2018, the Company serves clients ranging from enterprise organizations such as EY and Veterans United Home Loans to mid-market companies, including Impel, Hungryroot, and Talkspace, across technology, fintech, healthcare, and consumer sectors. The Company is now experiencing accelerated growth thanks to its integration of AI visibility, digital PR, and SEO into a unified marketing platform, meeting the increasing demand for Answer Engine Optimization (AEO), Generative Engine Optimization (GEO), and AI visibility solutions.

A strategic acquisition in 2025 added advanced technology, media assets, and AI visibility expertise, along with stronger leadership and operational infrastructure. The combination accelerated the Company's expansion into AI-driven discovery services. It contributed to strong momentum entering 2026, including the signing of one of its largest client engagements in recent years and significant year-to-date growth. The business delivers results through an integrated service model supported by proprietary AI visibility tools and a portfolio of owned media properties that extend reach, improve performance, and reduce reliance on third-party platforms.

Key Highlights

- **Clear Market Position**: Operates at the intersection of AI-driven discovery, digital PR, and content performance, addressing a structural shift in how buyers research and make decisions.
- **High-Margin Profile**: Retainer-based model, no client concentration above 10%, consistent profitability with EBITDA margins now exceeding 40%.
- **Experienced Leadership Team**: US-based ~30-person team led by management with deep agency experience and a track record of building and exiting marketing businesses.
- **Proven Land-and-Expand Model**: Long-tenured clients typically enter through a single service and expand into multi-service engagements over time.
- **Owned Distribution Infrastructure**: A portfolio of 18 media properties coupled with a proprietary content platform provides control over publishing, testing, and performance.
- **Cross-Sell Expansion Potential**: Clear opportunities to expand existing client relationships into adjacent service areas, creating potential upside for a strategic partner with complementary capabilities.

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Financial Profile

- **2026 Forecasted Adjusted Gross Income (AGI):** $5.97M
- **2026 Forecasted EBITDA:** $2.34M

- **2026 Q1 AGI:** $1.30M (2025 $877k - 48% YoY increase)
- **2026 Q1 EBITDA:** $613k (2025 $294k)
- **2026 Q1 Margin:** 46.8%

All excluding media asset disposals

- **2025 AGI:** $3.97M
- **2025 EBITDA:** $1.48M ($2.21M including media asset disposals)
- **2025 EBITDA Margin:** 37.5% (excluding media asset disposals)

2025 outcomes reflect integration costs from the acquisition and deliberate investment in the AI Visibility pivot, both of which are showing in Q1 2026 results.

Market Opportunity & Positioning

Buyer behavior is shifting rapidly toward AI-driven discovery, with decisions increasingly shaped by synthesized answers rather than lists of links. This shift creates a “winner-takes-most” dynamic, where only a small number of sources are surfaced and cited.

Most providers remain fragmented—SEO firms lack media reach, PR firms lack technical/AI capability, and AI visibility tools are narrow in scope. The Company addresses this gap with an integrated model that aligns visibility, authority, and conversion across channels.

Client Base & Retention

The Company serves ~60+ active clients across B2B and B2C sectors, including SaaS, fintech, healthcare, and consumer brands. Clients include EY, Veterans United Home Loans, Impel, Hungryroot, and Talkspace.

- **Average Client Tenure:** ~21 months for $25k/month accounts
- **Engagement Model:** Predominantly retainer-based
- **Expansion Dynamics:** Clients often increase spending as results improve, and additional services are adopted

The Company’s model is embedded into clients’ growth workflows, supporting retention and long-term client expansion.

Capabilities & Differentiation

- **Integrated Service Model**: Combines AI visibility, PR, content, AEO, GEO, and SEO into a unified system.
- **Owned Media Properties**: Provide direct publishing and earned media distribution capability, which also allows for a real-time testing environment.
- **Proprietary Technology**: AI-driven content platforms and workflow tools improve efficiency and output.

- **Conversion Platform**: Connects visibility and authority directly to clients' pipeline and revenue.

Together, these elements create a system in which performance improves over time as authority builds across channels.

Transaction Rationale

The Company continues to build momentum through 2026 as demand for AI-driven discovery accelerates. Their team is currently cultivating a $3.57M pipeline, its strongest ever. An experienced management team, with a track record of scaling marketing and agency teams, leads day-to-day operations with limited founder dependency.

One of the largest client engagements in recent years was signed in Q1 2026, contributing to approximately 50% year-over-year revenue growth and EBITDA margins exceeding 40%.

The shareholders are open to multiple transaction structures, including partnering with a financial sponsor to support continued growth or joining a larger strategic platform.

We invite interested parties to review additional information under NDA.

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