

MLA INTERIM LEGAL TALENT CASE STUDY

Leading brokerage and financial services provider acquired a new brokerage business, requiring rapid transition and compliance for accounts with Durable Power of Attorney designations. Client faced urgent compliance deadlines and a surge in DPOA-related account transitions post-acquisition. Internal resources were stretched, risking delays and regulatory exposure.

The Client:

Fortune 500

Industry:

Financial Services &
Insurance

Location:

Westlake, TX &
Indianapolis, IN

The Challenge

Client faced urgent compliance deadlines and a surge in Durable Power of Attorney (DPOA) account transitions following the acquisition of another brokerage business. Internal resources were stretched, risking delays and regulatory exposure. The client needed a large team of legal client services associates onboarded across multiple locations—on a very short turnaround.

The Solution

MLA rapidly sourced, screened, and onboarded 24 Legal Client Services Associates in under two weeks. The process included video interviews to ensure client-facing readiness, rigorous tracking of onboarding stages, and close coordination with client stakeholders. MLA's tailored approach ensured all associates met client's compliance and service standards.

The Results

All regulatory deadlines were met, and client avoided costly delays.

24 associates were onboarded in record time, with 100% compliance on onboarding protocols.

The project was completed within three weeks of launch, with positive feedback from client on the quality and professionalism of the MLA team.

Several associates were considered for permanent roles, and client expressed interest in future MLA engagements for similar high-touch projects.