

MERGERS & ACQUISITIONS

Large National Insurance Brokerage



CASE STUDY

ENGAGEMENT OVERVIEW

A rapidly expanding insurance brokerage was experiencing significant turnover and structural change within its M&A accounting function. As acquisition activity surged, the internal team faced staffing shortages, just as the volume and complexity of earnout calculations spiked. Without additional resources, the team risked delays in earnout payments, bottlenecks in reporting, and overburdening existing staff.

To avoid operational disruption, leadership turned to Alliance for flexible, senior-level support. The goal was to quickly add capacity, ensure accurate and timely earnout calculations, and strengthen underlying accounting processes so the finance organization could scale confidently through future growth and change.

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ALLIANCE SOLUTION

To support the client's M&A team, Alliance helped with:

01

Targeted M&A Reinforcement

Added experienced professionals to step into critical roles supporting high-volume and complex earnout review, prep, and resolution.

02

Process & Template Optimization

Streamlined procedures and standardized templates for earnout tracking, easing the burden on internal staff and increasing accuracy.

03

Technical Accounting Support

Brought an audit-informed perspective to navigate pervasive reporting issues and ensure clean, supportable financial outcomes.

04

Seamless Integration & Flexibility

Embedded with both M&A and corporate accounting teams, adapting to evolving structures while providing stability and continuity.

CLIENT OUTCOMES

- Completed 30+ earnout calculations, including highly complex cases that had been delayed for over a year.
- Streamlined monthly and quarterly earnout liability tracking, improving consistency.
- Reduced workload and prevented delays in critical reporting deadlines despite staffing gaps.