

Executive Case Study

Growing an Elder Law Practice Without Expanding Internal Staff

Executive Summary

A growing New York elder law firm that represents nursing homes and long-term care facilities faced increasing operational demands as its practice expanded across multiple states. Helping residents obtain Medicaid eligibility requires managing a continuous flow of court filings, legal documentation, government agency communications, and case management activities, all while meeting critical deadlines.

Rather than expanding its internal paralegal department, the firm partnered with Equivity to provide dedicated managed paralegal support. The goal was to increase legal capacity while minimizing the administrative responsibilities associated with recruiting, hiring, onboarding, and managing additional employees.

Today, Equivity provides a dedicated team that functions as an integrated extension of the firm's legal operations. Through ongoing account management, flexible staffing, and long-term collaboration, Equivity continues to support the firm's growth while delivering reliable operational support across multiple jurisdictions.

Engagement At a Glance

Metric	Outcome
Client	New York Elder Law Firm
Practice Area	Elder Law, Medicaid Planning, Guardianships, Estate Administration
Primary Clients	Nursing homes and long-term care facilities
Current Status	Long-term active partnership
Current Team	4 dedicated Equivity professionals
Peak Team Size	7 professionals
Monthly Support Hours	Approximately 700 (up from 160)
Geographic Coverage	Multiple Eastern U.S. jurisdictions
Leadership Meetings	Monthly
Additional Capacity	Typically added within approximately two weeks

The Challenge

The firm's practice centers on helping nursing homes and long-term care facilities secure Medicaid eligibility for residents while handling guardianships, conservatorships, estate administration, and related elder law matters.

As the firm's client base expanded, so did the volume of petitions, court filings, agency communications, document preparation, and ongoing case management required to keep matters moving efficiently. Supporting this growing workload across multiple jurisdictions would have required significant investment in recruiting, onboarding, supervising, and managing additional in-house personnel.

The firm instead sought a long-term operational partner that could provide dedicated legal support, integrate into established workflows, and expand alongside the practice as demand increased.

The Equivity Solution

Equivity integrates directly into the firm's existing legal operations by providing dedicated paralegal professionals who work as embedded members of the client's team.

The firm provides training on its procedures, state-specific requirements, and jurisdictional workflows, while Equivity manages staffing, ongoing oversight, and operational continuity. Team members are assigned to specific attorneys based on the jurisdictions they support, allowing them to develop familiarity with attorney preferences, state requirements, and day-to-day workflows.

Comprehensive, live, on-demand support means Equivity professionals actively manage matters as they progress throughout the workday. They prepare legal documents, coordinate court filings, communicate with attorneys, courts, financial institutions, investigators, government agencies, and process servers, monitor deadlines, and respond to time-sensitive requests to help ensure cases continue moving forward without interruption.

Scope of Support

The Equivity team supports a broad range of operational and paralegal activities, including:

- Drafting guardianship and conservatorship petitions and supporting documentation
- Preparing notices, cover letters, and certificates of service

- Opening and managing matters within electronic court filing systems
 - Preparing verification requests and subpoenas
 - Communicating with courts, financial institutions, investigators, and government agencies
 - Ordering official records, including death certificates
 - Coordinating process service
 - Managing calendars and case deadlines
 - Uploading and organizing legal documents
 - Requesting financial, property, and investigative records
 - Providing ongoing legal administrative support to attorneys
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Ongoing Partnership

Equivity's role extends beyond providing personnel.

Monthly meetings with firm leadership provide ongoing oversight of team performance, workload balancing, staffing needs, and evolving priorities. When issues arise, Equivity works closely with the client to implement agreed-upon solutions quickly while maintaining continuity across the engagement.

As staffing requirements change, Equivity can typically expand the team within approximately two weeks, enabling the firm to respond to increasing workloads without disrupting ongoing operations.

Why the Partnership Works

Embedded Legal Support

Equivity professionals function as integrated members of the firm's legal team, supporting attorneys throughout active matters while adapting to changing priorities and workloads.

Flexible Capacity

As the firm's practice has grown, Equivity has expanded the dedicated team to meet increasing demand while allowing the client to avoid building a larger internal support department.

Active Account Management

Regular leadership meetings, ongoing communication, and continuous oversight help ensure workloads remain balanced, priorities stay aligned, and service quality remains consistent.

Reliable Operational Execution

Dedicated professionals provide dependable support across multiple jurisdictions, helping maintain continuity throughout active matters while allowing attorneys to focus on higher-value legal work.

Results

Over the course of the partnership, Equivity has grown alongside the firm's expanding practice.

Since the partnership began, Equivity has:

- Increased dedicated support from approximately **160 monthly hours to roughly 700 hours**, reflecting the firm's continued growth and expanding operational needs.
- Expanded the Equivity team from **two dedicated paralegals to a peak of seven professionals** as client demand increased.
- Supported the firm's growth as it **approximately doubled in size** while allowing leadership to avoid building a significantly larger in-house support team.
- Delivered consistent operational support across **multiple Eastern U.S. jurisdictions**, helping attorneys manage growing caseloads while maintaining continuity in day-to-day operations.
- Established one of Equivity's longest-standing legal partnerships through responsive account management, consistent execution, and the flexibility to adjust staffing as business needs evolved.

Today, the engagement includes four dedicated Equivity professionals, with additional growth anticipated as the firm's practice continues to expand.

Key Takeaways

- Dedicated managed paralegal teams help law firms increase legal capacity without significantly expanding internal operations.
- Embedded legal support provides continuity across filings, communications, and ongoing case management.
- Flexible staffing enables firms to respond quickly as workloads evolve.
- Active account management supports long-term client relationships and consistent service quality.
- A managed staffing model allows attorneys and firm leadership to remain focused on serving clients and growing the practice.

Could This Model Work for Your Firm?

As law firms grow, increasing capacity doesn't always require expanding internal headcount.

Equivity partners with law firms to provide dedicated managed paralegal teams that integrate directly into existing legal operations, helping firms increase capacity, maintain operational continuity, and stay focused on delivering exceptional legal services.

Contact Equivity to learn how a dedicated managed paralegal team can support your firm's continued growth.