

# The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

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## Gray, Gray & Gray, LLP's News

### Will You Help Us Send Disadvantaged Children Back to School with the Supplies They Need?



The [Gray, Gray & Gray Charitable Foundation](#) is partnering with [Cradles to Crayons](#) in a "Back-to-School" drive to provide underprivileged families with backpacks filled with the essential items necessary for their children to succeed. In addition to donating \$1,000 toward the program, we have set a goal of filling 50 backpacks with items donated by clients, friends, and team members. ***Here's how you can help...***

**Now through August 4, visit our offices to drop off items from the [requested supply list](#) at our Cradles to Crayons lobby display. Or take a "paper backpack" and purchase and fill a backpack to donate. If you can't make it to our office, you can [make a financial donation here](#).**

Our connection with Cradles to Crayons is in keeping with the mission of the Gray, Gray & Gray Charitable Foundation: *Making a difference by actively supporting causes impacting the health and wellness of the community.* And, who knows? The backpack we fill today may someday return to us as a newly graduated accountant or business professional!

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## Family Business

### Succession Planning Requires Smart Strategies



**Overlooking succession** planning in a family-operated business is a major mistake. The company you spent years building could cease to exist without a solid plan. This article provides some considerations that will allow your company to continue successfully for generations.

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## Business Tax

### Protect Your Company Retirement Plan from an IRS Attack



**If your** business sponsors a retirement plan, you must invest prudently and stay in compliance with numerous complex federal requirements. If you don't follow the rules, the IRS could disqualify your plan. Here are some steps to help keep your business from falling into a costly noncompliance trap.

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## Personal Tax

### Help Your Kids Build a Fortune With a Roth IRA



**Do your** children or grandchildren work part-time after school and during the summer? Here is a smart family plan to consider that can help industrious kids save money for the future — and save a bundle on taxes.

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*Reuters.com - Thu, 29 Jun 2017 09:20:30 -0400*

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