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Going Beyond the Numbers to Deliver Insight, Guidance and Success

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Gray, Gray & Gray, LLP's News

Landmark Case on Fiduciary Role in 401(k) Plans



On August 16, after a nearly ten year journey through the courts, the U.S. District Court for the Central District of California reversed an earlier decision on a landmark case and ruled that plan fiduciaries continue to have responsibility for employee benefit plans (such as 401(k) plans) even after initial investment decisions have been made.

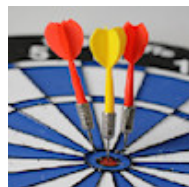
Plan fiduciaries (typically the business or business owner) will now have to spend more time and become more actively involved in the management of investments, including decision making regarding the share class of investments in the portfolio.

This presents a significant challenge to plan fiduciaries, many of whom have traditionally trusted an outside plan advisor or manager to make investment choices. The court's ruling means that plan fiduciaries must remain more fully engaged in investment decisions in order to fulfill their fiduciary responsibilities. [Read more here.](#)

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Family Business

Put Social Networking Sites to Work for Your Family Business



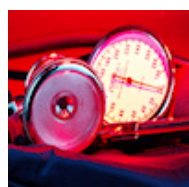
Marketing strategies have changed dramatically in recent years. Like it or not, a huge part of your target audience gets their news and information -- even their opinions -- from social media. Social networking sites like Twitter and Facebook can not only help you to broaden your customer base, but perhaps even reduce your traditional advertising budget. For more details on this win-win, read on.

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Benefits Administration

HSAs: A Great Tax-Saving Opportunity



Health Savings Accounts (HSAs) started as a good idea which got better, thanks to changes in the law made a few years after these accounts were first created. The innovative plans allow individuals and businesses to pay for out-of-pocket health expenses at a lower cost in many cases. Take a look at how HSAs work and how the current rules might favorably affect your business.

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