

# MAKE SURE YOUR VISION FOR THE FUTURE IS...



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**MONDAY  
NOVEMBER 18<sup>th</sup>**

Registration, Networking & Breakfast: 7:30 am

Seminar: 8:00 am - 12:00 pm

Newton Marriott  
2345 Commonwealth Ave.  
Newton, MA 02466

## Year End Business Planning Seminar

Join us as we look ahead to what the next year holds for business and industry. This seminar offers an overview of some of the top issues facing many businesses - from countering cyber threats, to dealing with a tight labor market, trends in M&A and taxes, and more. We'll help you get a head start on making 2020 a banner year for your business.

### 8:00 am - 8:45 am: Cybersecurity

*Bobby Garrett, Director of IT, Gray, Gray & Gray, LLP*

*David Peck, CEO, David J. Peck & Associates*

Cyber attacks are a growing concern for businesses of all sizes. Consider these facts:

- 76% of businesses reported being a victim of a phishing attack in the last year
- 59% of organizations have experienced a malware infiltration in the past six months
- Up to 70% of US companies polled have paid a ransom to recover data

We'll give you an overview of the latest attack techniques and how you can protect your business against online criminals.

### 8:45 am - 9:30 am: Tax Update Panel

*Moderator: Jim DeLeo, MBA, CPA/MST, Leading Partner, Gray, Gray & Gray, LLP*

*Panelists: Kelly Berardi, JD, Partner; Brad Carlson, Partner; Derek Rawls, CPA, MST, Partner*

Everything you need to know about the tax landscape, including individual and business tax issues and opportunities. Learn more about:

- Succession planning
- Tax impact on buy/sell transactions
- Due diligence
- Nexus and foreign reporting issues
- Opportunity zones
- Business structure

### 9:30 am - 9:45 am: Break

### 9:45 am - 10:30 am: Employment Law

*Brendan Lowd, Associate, Mintz*

*Gauri Punjabi, Associate, Mintz*

Recruitment, hiring, and firing are all critical concerns in today's economy. Recently, Massachusetts enacted several new employment statutes that affect all employers. Learn what you need to do to protect your business when dealing with employees.

### 10:30 am - 11:15 am: M&A Trends

*Derrick Rebello, CPA, Partner, Gray, Gray & Gray, LLP*

*Kurt Steinkrauss, Partner, Mintz*

Business acquisition and merger activities are at an all-time high. We'll reveal what you can do to take advantage of the hot M&A market to grow or expand your company, including tips on preparing for sale, the due diligence process, Quality of Earnings, and multiples.

### 11:15 am - 11:30 am: Break

### 11:30 am - 12:00 pm: Breakout Sessions

#### Client Accounting & Advisory Services (CAAS)

*Kim Benevides, CPA, MST  
Manager  
Gray, Gray & Gray, LLP*

Cloud-based accounting and outsourced CFO services are helping businesses advance their strategic agenda consistently and profitably. By outsourcing a range of business processes, companies are building efficiencies while gaining mission critical, proactive guidance. Join us to hear more about the transformation of CAAS and the impact on businesses' bottom lines.

#### Sage Intacct Accounting Software: A Powerful Tool for Growth

*Kristen Schrump  
Manager  
Gray, Gray & Gray, LLP*

Find out how advances in technology and cloud computing are streamlining business services and accounting. See how Sage Intacct is helping to give companies greater visibility into the key financial and operational data needed to make better informed business decisions on a daily basis.

#### Private Wealth Management Insights

*Dan Romano, CPA, PFS  
Managing Member  
Gray Equity Management  
Jim DeLeo, MBA, CPA/MST  
Leading Partner  
Gray, Gray & Gray*

A candid discussion about the changing nature and demands of managing, growing and preserving wealth. What steps are clients taking to secure their future? What new opportunities exist? How is the role of wealth management advisor evolving? How will changes in the tax landscape impact asset value? This is a great chance to review your own wealth management position in a context of shifting conditions.

**REGISTER  
NOW**

Attendance at our Year End Business Planning Seminar is free, but seating is limited. Please reserve your place by registering today.

**Online:** [www.gggcpas.com/year-end-business-planning-seminar-2019](http://www.gggcpas.com/year-end-business-planning-seminar-2019)

**Via email:** [beyondthenumbers@gggcpas.com](mailto:beyondthenumbers@gggcpas.com)

**By phone:** Laura Pollis at 781.407.0300