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GG&G News - Employee Benefit Plan Audits

The Biggest Threat to Your Tax Return? Scammers!



As we race toward the end of 2019 individuals and businesses alike are making plans and taking steps to position themselves favorably for their annual tax returns. For example, many businesses are making late year purchases to take advantage of Section 179 deductions, while individual taxpayers might be moving funds into retirement savings or making gifts as part of an estate plan. But many people are unaware of a threat that could have the biggest impact on their 2019 tax return: scammers and cyber criminals.

To read the full article [click here](#).

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Changing the Look of Leadership 2019 Recap



The Gray, Gray & Gray Women's Alliance hosted its first "Changing the Look of Leadership" seminar last week. This interactive panel discussion brought together a stellar group of women leaders in our local community who have redefined the meaning of success. Moderator [Kip Hollister](#) and panelists [Nicole Peterkin, CFP, CLU](#), [Marianna Accomando](#), [Jill Beresford](#), [Lynn Sommer](#), and [Kelly Berardi, JD, LL.M.](#), shared their real-life experiences – from pitfalls to triumphs. The panel discussion was followed by networking and a cocktail reception.

Special thanks to our moderator and panelists for sharing their knowledge and personal experiences. [Click here](#) to view event photos on our Facebook page.

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Employee Benefits

When Rolling Over Can Be the Wrong Strategy



Tax-free rollovers of retirement funds are often the way to go when retiring or leaving your job. But if your retirement plan contains appreciated employer stock, there is another strategy that could provide substantial tax savings. Keep reading to see why you might want to put those shares in a *taxable* account.

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Benefit Tax Issues

Don't Panic If You Receive a Benefit Audit Notice



The word "**audit**" strikes fear in the hearts of many company executives. But if your ducks are in a row, don't sweat it. It's in everyone's interest to make the process go smoothly, which is why the IRS provides tips for an efficient benefit plan audit. Read on to find out what the IRS recommends.

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Retirement Plans

Avoid Common Pitfalls of Retirement Plan Compliance



Your company's retirement plan may be just as vulnerable to an IRS audit as the rest of your business. The consequences of having an audit that reveals serious problems in your plan's operation can be severe, including revocation of its tax-exempt status. But the IRS says it wants to help you sail through an audit without any issues, if you have to undergo the process. Here are some tips.

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"We formerly had our employee benefit plan audit with one of the 'Big Four' national accounting firms, but knew that we were not getting the attention and service we needed. Making the switch to Gray, Gray & Gray was like night and day! We are getting the same degree of competence and experience, but with a much higher level of service. At much more reasonable fees, too!"
-New England Sports Network (NESN)

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