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### GG&G News - Employee Benefit Plan Audits

#### Gray, Gray & Gray Welcomes Jeffrey Yolles, JD, as Tax Manager



Gray, Gray & Gray is pleased to announce the addition of Jeffrey Yolles, JD, to our growing team of tax professionals committed to going beyond the numbers for our clients.

*"Jeff Yolles adds a great deal of additional depth and experience to our staff," said Joe Ciccarello, managing partner. "As both an accountant and a tax attorney, Jeff has a solid command of today's complex tax issues, leading to more effective guidance for our corporate and individual clients."*

Welcome aboard, Jeff!

Click here to learn more about Jeffrey Yolles joining the Gray, Gray & Gray firm.

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### Timely Opportunities

#### Important Tax Figures for 2014



Every year, the dollar amounts allowed for various federal tax benefits are subject to change based on inflation adjustments and legislation. Here are some important tax figures for 2014, compared with 2013, including the estate tax exemption, Social Security wage base, qualified retirement plan and IRA contribution limits, driving deductions, allowable business write-off amounts and more.

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#### IRS Offers New Guidance on Roth 401(k) Rollovers



Does your company have a Roth 401(k) plan for employees? As the name implies, these plans are a hybrid -- taking some characteristics from the Roth IRA, and the employer-sponsored 401(k). Recently, the IRS released guidance on rolling over funds from a traditional 401(k) to a Roth account within the same plan. This article explains.

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### Employee Benefits

#### Protection if Employees' 401(k) Choices Yield Poor Results

The last several years have seen major changes in retirement planning, as the responsibility for financing and investment choices has shifted increasingly to the employees.



Although plan administrators are generally not responsible if an employee makes a poor choice, they are expected to ensure that a broad range of prudent choices is available. Is your business in compliance with the law?

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## Benefit Tax Issues

### Gain Employee Loyalty With Commuting Tax Breaks



The tax law allows your company to help employees get to work by providing tax-free transportation. Keep reading to learn about a fringe benefit which can result in appreciation from your staff members and a reduction in payroll taxes. *Note:* Bicycle commuters now get a tax break too.

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## Retirement Plans

### A Compass for Your 401(k)



Retirement plan investment options can be complicated to navigate and while investment policy statements are *de rigueur* in defined benefit plans, they are less frequent with 401(k)s. Yet, there are many advantages to having a policy document to clarify goals and manage fiduciary responsibilities. Read on for some guidelines of what these statements should cover.

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