

# The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

GRAY GRAY & GRAY  
CERTIFIED PUBLIC ACCOUNTANTS | ADVISORS

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

### 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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## Family Business

### Family Financing Can be Fragile

Finding seed money for a family-run business often requires tapping relatives. While



that can be a source of capital, relationships can be strained when things don't go as expected. Click "Full Article" for ways to secure financing, keep the peace, and get the best tax results.

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## Management

### Guard Against Age-Bias Suits When Downsizing



Layoffs can be unavoidable, and when they are, your business should take protections to avoid litigation, particularly when it comes to age discrimination. While you can ask employees to waive their right to file age-bias suits, federal law governs the terms of those accords rigidly. Click "Full Article" to understand how the statutory requirements work.

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## Operations

### Investigate Zoning Laws Before Committing to a Location



Land-use regulations outline legally acceptable uses for locations, and previous use is no guarantee that your business will be able to set up shop at your desired locale. Before you sign a rental agreement or a contract to buy commercial real estate be sure to check out the local zoning laws. Taking this precaution can help avoid expensive troubles. Read the "Full Article" for the details.

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