

The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

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Gray, Gray & Gray, LLP's News

New for 2015: Gray, Gray & Gray Client Portal Replaces Flash Drives



Go Beyond the Numbers Faster and Easier Than Ever! Our Client Portal is your own private online gateway to your tax return information. Start using it today!

- Enjoy paperless, easy, fast and secure electronic transfer of documents
- No more waiting for your tax return or other important documents to arrive in the mail
- E-file with greater ease than ever – all your documents are in one place
- Grant your banker or other professionals permission to view specific documents online

It's more timely and secure than "snail mail," and will make your life simpler. See for yourself! Watch your inbox for an email with instructions on how to access your Client Portal.

**Gray, Gray & Gray makes no representation or warranty that 24 hour service will be available on the Client Portal. We make no warranty, express or implied, regarding the efficacy of the security of the Client Portal and shall never be liable for any claimed actual or consequential damages arising from any breach or alleged breach of security of the Client Portal.*

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Business Tax

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Retirement and medical expenses aren't necessarily a good mix for you or your retired employees if the company's pension plan pays defined benefits. Health care costs can take a chunk out of the plan's payments without offering any offsetting tax benefits. A 401(h) plan, however, could be the answer. Click "Full Article."

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Personal Tax

Writing Off Worthless Stock Investments

When it comes to stock losses, "worthless" can be in the eye of the beholder. An



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investment may have all the earmarks of being without value, but in order to claim a loss, you have to view the situation through the eyes of a very particular beholder ... the IRS. It may feel like you have to look into a crystal ball. For details on how to claim a tax loss for worthless stocks, click "Full Article."

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