

The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

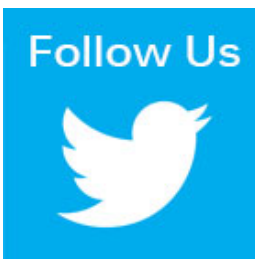
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Gray, Gray & Gray, LLP's News

Have You Taken Inventory of Your Personal Estate Lately?



The start of a new year is also a good time to ensure your important financial and personal information records are up-to-date. Remember, keeping track of important financial and personal information can prove critical for both you and your loved ones during various life events.

For your convenience, Gray, Gray & Gray developed a [Personal Estate Inventory spreadsheet](#) to assist you with the process. This spreadsheet may also be useful in accumulating current financial information which can be used for estate, gift or financial planning purposes. [Click here to view the](#)

[Personal Estate Inventory spreadsheet.](#)

Please keep in mind that to assure the continued protection of present estate plans, it is important that wills and other related documents be reviewed and updated on an annual basis. Please [contact us](#) with any questions, or for help in estate, gift tax or financial planning matters.

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Family Business

Sell the Family Business the Tax-Smart Way



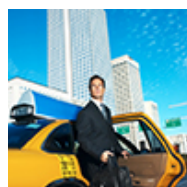
Let's say you and the other family business co-owners are ready to cash out by selling the company. You obviously want to maximize the after-tax sales proceeds. Here are some considerations and important steps you can take to help achieve that goal.

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Business Tax

Strictly Speaking: Travel and Entertainment Recordkeeping



The IRS takes a strict position on travel and entertainment deductions. If you don't follow recordkeeping requirements, the tax agency may disallow the sought-after deductions. This article explains the basic rules, lays down some guidelines for providing proper receipts, and delves into a few additional points that both employers and employees will find helpful.

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Personal Tax


Rx for Itemizing Medical Expenses




Congress increased the threshold for deducting medical expenses on your personal tax return. But a lower threshold still applies to some taxpayers until 2017. Here are more details on these itemized expenses, including a checklist of medical, dental and vision care items to consider when compiling your annual expenses for tax purposes.

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