

The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

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Gray, Gray & Gray, LLP's News

Is Your 401(k) Plan Up to Snuff? Watch Out for These Audit Red Flags



Statistically speaking, the odds of a Labor Department audit of your retirement plan are slim -- unless something really goes wrong and a plan participant sounds the alarm. Regardless, it's always better to find errors on your own and fix them via the IRS Employee Plans Compliance Resolution System, than to have them discovered in an audit. Here are some of the top areas that get plan sponsors into trouble.

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Family Business

Family Ties are Severed in Stock Sale



Intrafamily stock transfers can have major implications on the net operating loss carryovers of a family corporation. This is due to complex rules that limit such losses when there is a significant change in ownership. In one case, a taxpayer argued that a sale of a large percentage of his stock to his brother should not fall under the rules because they were members of the same family and should be treated as a single shareholder. The IRS disagreed. Find out how the Tax Court ruled by clicking "Full Article."

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Sales

Stop Sending Customers to the Competition



You probably have a good idea of what your business does for customers, but what about what you *don't* provide? Without this information, you're weakening your profit potential. With the right data at your disposal, you can keep your customers satisfied and bolster the bottom line. Click "Full Article" for a checklist to track lost sales. It's a critical step toward putting the pieces of the puzzle together.

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Marketing

Drop Some of Your Customers

Concentrate your company's sales and marketing efforts on those high-performing customers who generate the *most* profit. It's a matter of identifying the most lucrative groups. Click "Full Article" to see what data you need to collect to potentially watch your profits soar.



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