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Summer Time is the Perfect Time to Take Inventory of Your Personal Estate



Summer is in full swing and it's the perfect time to ensure your important financial and personal information records are up-to-date. Afterall, 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.









Employee Benefits

Two Perspectives on the FMLA



Since its passage, the Family and Medical Leave Act (FMLA) has caused many employers to voice concerns about the effects on business operations. That's one of the reasons the Department of Labor put together a report describing the FMLA experiences of both managers and employees. Click "Full Article" to read some comments from the report that details the strengths and weaknesses of the law. Copyright © 2016

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Benefits Administration

Testing to Screen Out Reckless Employees



Accidents happen. That's a fact of life. But the last thing any employer needs is to hire someone who has a high likelihood of being involved in or creating safety issues on the job. We've all known at least one person who seems to attract such problems. We sometimes call them "accidents waiting to happen." Smart companies do their best to avoid employing them. Here are some ways. Copyright © 2016

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Benefit Tax Issues



There's a relatively new option to pay for out-of-pocket health costs. It's called a Health Savings Account and it provides individuals and businesses a tax-advantaged vehicle to pay medical bills. And unlike flexible spending accounts which have a "use it or lose it" feature, you don't have to zero out the account every year. You can carry over any unused portion to the next year. Here are the details.

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