

The Advisor

Going Beyond the Numbers to Deliver Insight, Guidance and Success

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Gray, Gray & Gray, LLP's News

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. After all, 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

Keep Family Employees in Line



Solid, successful companies have standards that every employee must meet – and that should also be true for family-run businesses. Click "Full Article" for tips on how to ensure your family members are meeting performance standards and not generating resentment among the other employees.

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Sales

Design a Winning Logo



Successful companies know the best way to gain solid brand recognition is to develop an effective logo. But designing one doesn't have to break the bank. Here are some tips on how to have a memorable corporate image that is crafted for less money than you think.

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Marketing

Five Website Design Errors



A website projects your company's image to the world. It's an invitation for potential customers to do business with you. By avoiding these five common design mistakes, you can help ensure that you lure visitors in with your site rather than turn them away.
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