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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?



Keeping track of important financial and personal information can prove critical for both you and your loved ones during various life events. 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

Define a Chain of Command



Running a business with your relatives can be profitable and fulfilling, but you may have problems that other companies don't have to face. Click "Full Article" for a solution to make your firm run smoothly.

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Management

Intellectual Property: Protect Your Company From Disaster



Intellectual property ownership issues can become complicated when your employees develop software and written materials for your company. Without the proper legal safeguards, you might be surprised to find your company out in the cold. Here are some guidelines to help clear the air and safeguard your business interests.

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Operations

Combat All Threats to Data Security



Data protection is not only critical, it can be a matter of financial survival for some companies. Regardless of size, every organization needs to have a system in place to safeguard customer and client information, as well as to protect its trade secrets and other intellectual property. Here is a checklist of the basics your organization needs to consider in order to assess the security of electronically stored material.
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