

Benefit Tax Issues

Long-Term Care Insurance Can Be a Tax-Free Perk



For tax purposes, long-term care insurance grows more attractive depending on who buys the policy. There's a big difference in the tax implications of a policy purchased by you as an individual and the same policy purchased by your family business. To find out how to maximize the tax benefits before buying, keep reading.

Copyright © 2013

Retirement Plans

Meeting the ERISA Plan Audit Requirement



Certain benefit plans must include an independent audit with the annual report required under the *Employee Retirement Income Security Act*. This helps ensure that the plan's financial statements are presented fairly. Keep reading for a rundown of the requirements and exemptions.

Copyright © 2013

Latest Headlines

Wal-Mart's South African unit lags rival in expansion

Reuters.com - Thu, 22 Aug 2013 14:41:43 GMT

In U.S., China, Europe, data points to global rebound

Reuters.com - Thu, 22 Aug 2013 14:39:30 GMT

Analysis: Central Europe sheltered from emerging markets sell-off

Reuters.com - Thu, 22 Aug 2013 14:38:39 GMT

Morgan Stanley fined \$1 million over bond pricing violations

Reuters.com - Thu, 22 Aug 2013 14:20:39 GMT

U.S. August auto sales to rise 12 percent: JD Power & LMC

Reuters.com - Thu, 22 Aug 2013 14:18:51 GMT

Saved Articles

View Report

- No saved articles.

Disclaimer of Liability

Our firm provides the information in this e-newsletter for general guidance only, and does not constitute the provision of legal advice, tax advice, accounting services, investment advice, or professional consulting of any kind. The information provided herein should not be used as a substitute for consultation with professional tax, accounting, legal, or other competent advisers. Before making any decision or taking any action, you should consult a professional adviser who has been provided with all pertinent facts relevant to your particular situation. Tax articles in this e-newsletter are not intended to be used, and cannot be used by any taxpayer, for the purpose of avoiding accuracy-related penalties that may be imposed on the taxpayer. The information is provided "as is," with no assurance or guarantee of completeness, accuracy, or timeliness of the information, and without warranty of any kind, express or implied, including but not limited to warranties of performance, merchantability, and fitness for a particular purpose.

To ensure compliance with requirements imposed by the IRS, we inform you that any tax advice contained in this communication (including any attachments) is not intended or written to be used, and cannot be used, for the

purpose of avoiding penalties under the Internal Revenue Code.

Investment advisory services offered through Gray Equity Management, LLC. Gray Equity Management, LLC is not affiliated with 1st Global Capital Corp. Securities offered through 1st Global Capital. Corp., Member FINRA, SIPC, (800) 959-8440

34 Southwest Park Westwood, MA 02090