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2015 Year-End Tax Planning



As of August 2015, with the end of the year and the income tax filing deadline on the horizon, tax planning presents more of a challenge than usual.

So far, Congress has passed minimal tax legislation. However, the Senate Finance Committee at the end of July 2015 approved a two-year extension of the tax provisions that expired on December 31, 2014. Early passage of an extension is hoped for but not assumed because the House of Representatives is pursuing an agenda that would make the provisions permanent.

As in most years, tax law changes – or possible changes – make it worthwhile for you to stay informed so you can minimize taxes or at least avoid missteps that could complicate your life.

[Click here to view the 2015 Year-End Tax Planning Letter for more information.](#)

Please feel free to [contact Gray, Gray & Gray](#) with any tax planning questions.

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Family Business

Value Your Business Internally and Externally



Valuing your family business can help determine whether you should keep it, sell it or pass it on to a family member -- either now or in your estate plan. There are two types of valuations that relate to a small business. Here are details on both and how they can fit into the succession plans for your family business.

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Personal Tax

What You Need to Know About 529 Plan Withdrawals

Many parents and grandparents have spent years putting away money for college in Section 529 savings plans. But what happens when it's time to take withdrawals? Although you may think that all withdrawals are tax free, it's not that simple. This article explains five important facts that you should know before taking 529 plan



withdrawals.
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Benefits Administration

Duties of an ERISA Plan Administrator



Administering ERISA plans on behalf of employees is a big job, with some important responsibilities. If you're the plan administrator, you're expected to perform a critical function for your employer that requires a lot of time, care, attention to detail and personal integrity. This article takes a look at what plan administrators must do.

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