



g³ Focus on Employee Benefit Plan Audits
The Power to Make the Complex Simple.

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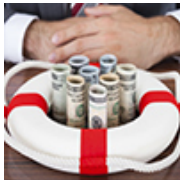
Don't Miss Out - Our Year End Planning Seminar is Tomorrow! Register Now



What will it take to thrive in 2023? Find out at tomorrow's Year End Planning seminar! Join us at our Canton headquarters to learn about the latest tax updates and how mid-term elections could impact the tax landscape. Discover more about the complex new Lease Accounting requirements and how to prepare now to meet them. Uncover technology to assist you with building organizational efficiencies while keeping a pulse on key metrics. Learn more about the importance of cybersecurity in an increasingly connected world. Get a preview of what to expect in M&A and the equity markets in the coming year. Plus, find out how a renewed emphasis on strategic business planning can help keep your organization on the right path – straight from our clients who have planned for success in their own companies, including Kristin Draper of Draper Knitting Co., Tom Kearns of DSK |Dewing Schmid Kearns Architects + Planners, and Clayton Turnbull of The Waldwin Group. Click [HERE](#) to register.

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Employee Benefits



Be Careful to Document Hardship Distributions and Plan Loans

The IRS is cautioning plan administrators that they need to keep documentation for all employee loans from qualified retirement plans. The same is true for hardship distributions made to employees. This article explains the basics about plan loans and hardship distributions, along with the paper or electronic records that must be kept.

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Retirement Plans



When Rolling Over Can Be the Wrong Strategy

Tax-free rollovers of retirement funds are often the way to go when retiring or leaving a job. But if your retirement plan contains appreciated employer stock, there is another strategy that could provide substantial tax savings. Keep reading to see why you might want to put those shares in a *taxable* account.

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Benefits Administration



Vigilance Can Reduce Family Medical Leave Act Cheating

The purpose of the Family Medical Leave Act (FMLA) was to allow sick or injured workers time to recover without losing their jobs. The same is true when an employee has a sick or injured family member who requires care. Unfortunately, some workers have treated the FMLA as extra time off to be used as they wish. If you suspect this is happening in your workplace, there are remedies. Read on for details.

[Full Article](#)

"We formerly had our employee benefit plan audit with one of the 'Big Four' national accounting firms, but knew that we were not getting the attention and service we needed. Making the switch to Gray, Gray & Gray was like night and day! We are getting the same degree of competence and experience, but with a much higher level of service. At much more reasonable fees, too!"
-New England Sports Network (NESN)

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