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Gray, Gray & Gray News - Employee Benefit Plan Audits

ANNOUNCING Gray, Gray & Gray's 2023 Year End Planning Seminar



Join us on **Tuesday, December 5th at Gray, Gray & Gray's Canton Office** to learn what challenges business leaders will face in 2024, and how they can prepare to meet them. Learn what lies ahead on the economic front, how to plan for more changes in your corporate and personal taxes, and why the M&A market is set to heat up again. Plus you'll hear directly from successful business owners what strategies they are using to navigate their companies through tumultuous times. **Click [HERE](#) to learn more and register today.**

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Employee Benefits

When Rolling Over Can Be the Wrong Strategy



Tax-free rollovers of retirement funds are often the way to go when retiring or leaving your 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.

[Full Article](#)

Benefit Tax Issues

Generous Health Plan May Not Preclude HSA Contribution



If you're covered only by a health insurance plan with a high-deductible, you may be eligible to contribute to a tax-advantaged health savings account, even if your spouse has other, more generous coverage. The rules can be confusing, but the IRS has clarified who qualifies and who doesn't with some examples. Here are the specifics.

[Full Article](#)

Retirement Plans

It Is Never Too Early to Think About Retirement



The more time you and your employees have to sock away money for retirement, the more you'll have to spend enjoying the golden years. It's all about the power of compounding. Continue reading for a glimpse at the breathtaking effect this mathematical phenomenon can have on a retirement nest egg.

[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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