

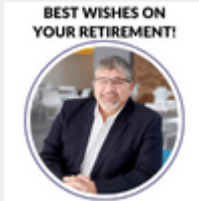


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Gray, Gray & Gray, LLP's News

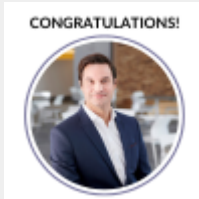
Congratulations to Gray Private Wealth CEO Daniel Romano on Your Retirement!



It is with deep appreciation and gratitude that Gray Private Wealth announces the retirement of founder and CEO Daniel C. Romano, CPA, PFS. Romano was one of the founders of Gray Private Wealth, LLC (formerly Gray Equity Management, LLC), which was formed in 1999 to serve the wealth management and investment advisory needs of high-net-worth individuals and families. He served as the firm's initial Managing Partner before being named Chief Executive Officer. Congratulations on your retirement, Dan! [Click HERE to read the full press release.](#)

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Justin Klunder Named CEO at Gray Private Wealth, LLC



We are elated to announce that Justin Klunder, CFA has been promoted to Chief Executive Officer (CEO). He had previously served as the firm's Partner and Chief Investment Officer, a role in which he will continue. "While the investment industry is experiencing a period of great uncertainty coupled with unique challenges, there is also an abundance of opportunities, and our firm is in an excellent place to navigate the environment and deliver for our clients" said Klunder. Congratulations, Justin! [Click HERE to read the full press release.](#)

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Family Business

Start Succession Planning Now



Don't wait one moment longer. Succession planning for family businesses is often complicated and even emotional. Creating a clear and cohesive plan for how ownership will pass to the next generation is critical to avoiding conflicts that could harm or even end the company. This article discusses strategies that family business owners should consider when developing a solid succession plan.

[Full Article](#)

Business Tax

A Deduction for Energy-Efficient Buildings Was Enhanced by a 2022 Law



A law passed in 2022 significantly enhanced the Section 179D deduction for energy-efficient commercial building improvements. It nearly tripled the maximum deduction allowed under certain circumstances and made it easier for improvements to qualify. The law also expanded eligibility for the deduction to include real estate investment trusts as well as to designers of buildings owned by nonprofit organizations. This article details the enhancements.

[Full Article](#)

Personal Tax

Medical Costs: Can I Really Get a Tax Break for That?



Can you deduct the cost of a facelift? How about "Lasik" eye surgery or the cleaning solution for contact lenses? Some of the procedures that pass muster with the IRS may surprise you. Take a look at a chart with eligible and not-eligible medical expenses. There are some unusual qualified expenses that might allow you to get a tax break.

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