



Designing & Building Your Future

A Blueprint for
Growth & Profitability.

March 2024 Issue

Gray, Gray, & Gray Ranked Among Top Massachusetts Accounting Firms by Boston Business Journal



We are elated to announce that Gray, Gray & Gray has been ranked as the 17th largest accounting firm in Massachusetts by the Boston Business Journal, up two spots from the previous year's position. The publication's annual rankings are based on the size of the firm's professional staff in the state and include both independent firms and regional offices of large national accounting firms.

[READ THE FULL PRESS RELEASE](#)



Should I File or Extend This Year?

With a significant tax bill seemingly stuck in Congress, many clients are asking, "Should I file or extend for the March 15 and April 15 tax deadlines?"



Some background: The Tax Relief for American Families and Workers Act of 2024 (H.R. 7024) stormed through the House of Representatives with a resounding bipartisan vote (357-70) approving the bill on January 31, 2024. However, no clear movement has been generated in the Senate, where the bill remains in limbo, waiting to be either voted on in its current form, or debated, marked up and potentially updated.

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LAST CHANCE TO REGISTER!

The Smart Business Dealmakers Boston Conference on March 7th

The Smart Business Dealmakers Conference connects thousands of local dealmakers - from middle-market CEOs to top investors and lenders to leading M&A advisers. With sessions ranging from raising capital to buying and selling companies to alternative asset investing, this conference covers the breadth of the M&A landscape.



Gray, Gray & Gray is proud to be a co-sponsor for this major M&A event that will feature speaking engagements, networking, and panel discussions, including the following session moderated by our very own Leading Partner, Jim DeLeo:

Preparing Your Company for Sale (11:00-11:40am)

Moderator: [Jim DeLeo](#), Leading Partner, Gray, Gray & Gray

Panelists: [Mark Abare](#), Former Owner, President & CEO, Plastics Distributors and Fabricators, Inc.; [Rufus Clark](#), Co-Founder & Managing Partner, Bunker Hill Capital; [John Gardella](#), Shareholder, CMBG3 Law

Unlock the secrets to a successful company sale as two M&A advisors, a Private Equity leader, and a former business owner reveal essential insights to getting your house in order. You'll learn about effective sell-side strategy and why preparation can be the difference-maker in effectively reaching the close.

Click [here](#) to view the full event agenda and be sure to register below. Use promo code **GRAY150** to save \$150 off registration.

REGISTER HERE

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Avoiding Unexpected Tax Implications in Mergers and Acquisitions



One of the most important aspects of any M&A deal is the tax planning. While experienced dealmakers know to expect certain tax consequences, there are often unexpected tax implications that can arise. These unexpected tax bills can have a significant impact on the value of the deal and the financial well-being of the companies involved.

[READ THE FULL ARTICLE](#)



Important Tax Deadlines for the 2023 Tax Year

Individuals and businesses need be aware of upcoming deadlines for filing taxes and submitting various forms. Staying informed and prepared will help ensure compliance with the IRS requirements and avoid potential penalties. Click below for the key deadlines for the 2023 tax year that you need to mark on your calendar.



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