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Gray, Gray & Gray News - Employee Benefit Plan Audits

Future Proofing Your Business Through Strategic Planning



The imperative for robust strategic planning has never been more critical. This white paper underscores the pivotal role strategic planning plays in enabling businesses to navigate through uncertainty, adapt to changing market dynamics, and seize opportunities for growth and resilience. Drawing on industry insights, economic forecasts, and strategic frameworks, we delineate why strategic planning is not just a business luxury but a fundamental necessity for survival and success in the coming years. [Click HERE](#) to read the full white paper.

[Full Article](#)

Celebrating Women's History Month - Kelly Berardi Featured in Boston Business Journal



We are honored to have our very own Kelly Berardi, Partner at Gray, Gray & Gray, featured in Boston Business Journal's People on the Move in celebration of Women's History Month. As an advocate and champion for women in the industry, Kelly helps up and coming women in accounting to navigate challenges and create rewarding careers. [Click HERE](#) to learn more.

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Employee Benefits

Meeting the ERISA Plan Audit Requirement

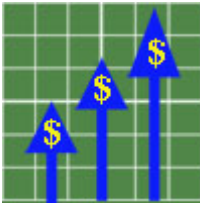


Certain benefit plans must include an independent audit with the annual report required under the *Employee Retirement Income Security Act* (ERISA). This helps ensure that the plan's financial statements are presented fairly. This article provides a look at the requirements and exemptions.

[Full Article](#)

Benefit Tax Issues

Long-Term Care Insurance Can Be a Tax-Free Perk



For tax purposes, long-term care insurance grows more attractive depending on who buys the policy. There's a big difference in the tax implications of a policy purchased by you as an individual and the same policy purchased by your family business. To find out how to maximize the tax benefits before buying, keep reading.

[Full Article](#)

Retirement Plans

Navigating the Shoals of 401(k) Hardship Withdrawals



As you already know, the primary purpose of a 401(k) plan is to accumulate tax-deferred retirement savings. But employers have the option to let a plan be used for another purpose — helping employees address a personal financial crisis. If your plan does allow for "hardship" withdrawals, however, you need to be sure they satisfy strict IRS guidelines.

[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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