



Designing & Building Your Future

A Blueprint for
Growth & Profitability.



February 2025 Issue

Announcing the Smart Business Dealmakers Boston Conference on March 20th

[The Smart Business Dealmakers Conference](#) connects thousands of local entrepreneurs, investors and advisers for a day of dynamic content and networking. 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:

Deal Prep

Presented by: Gray, Gray & Gray / CMBG3 Law / Gerron Group LLC / Truck 9 Partners / Ti-SALES, Inc.

11:00-11:40am

Additional details coming soon.



Click [here](#) to view the full event agenda and be sure to register below. Use promo code GRAY250 to save \$250 off registration.

REGISTER TODAY

Aligning Your Technology with Your Mission

We are excited to announce the launch of our Technology Integrations Consulting practice at Gray, Gray & Gray. This new service helps businesses connect and optimize their digital systems to drive efficiency and growth.



Our expert team will help you:

- Streamline operations by eliminating data silos
- Automate manual processes
- Enable real-time business insights
- Scale your technology infrastructure

Through partnerships with industry leaders like Workato, DataBlend and Microsoft we deliver customized integration solutions that maximize your existing technology investments.

The Power of Connection

We're kicking off our Technology Integrations Consulting services with a bi-monthly webinar series: "The Power of Connection." We'll tackle all the burning questions about how to best deploy and utilize the incredible array of tools available to streamline operations and build a more efficient business. Look for our first episode in February.

But if you can't wait to learn how we can transform your digital ecosystem, [contact us today](#) for a complimentary technology integration assessment.

LEARN MORE

Supreme Court Decision May Clear Path for Corporate Transparency Act Enforcement

On January 23, 2025, the U.S. Supreme Court removed one nationwide injunction on the enforcement of the Corporate Transparency Act (CTA), a significant change designed to enable the Financial Crimes Enforcement Network (FinCEN) to proceed with its regulatory framework. However, according to FinCEN, a separate nationwide injunction, issued by a separate Texas court, remains in place.



LEARN MORE

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Get to Know Marty Prendergast



What is it like to be a Senior Tax Manager at Gray, Gray, Gray? In our latest video as part of our Get to Know You series, Marty Prendergast shares some key aspects of his journey with the firm over the past 13 years, including how he was supported and empowered through coaching and mentoring, which helped him to grow from an intern to his current role as Senior Tax Manager. Learn about his commitment to

doing more for clients within g3's AED niche, his involvement with Gray Leadership Academy, his positive experience with work/life balance, and more.

WATCH NOW

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IRS Updates R&D Tax Credit Form

Significant changes are coming to how businesses report their Research and Development (R&D) tax credits. The Internal Revenue Service has recently released draft revisions to Form 6765, marking the most substantial revision in the form's history. Here's what business owners and financial managers need to understand about these changes.



LEARN MORE

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Richard Frizzell Elected Partner at Gray, Gray & Gray

It is our sincere pleasure to announce that [Richard Frizzell, CPA, MSA](#) has been elected a partner in Gray, Gray & Gray's Transaction Advisory Services practice, which assists businesses contemplating a sale or an acquisition.

"Rich Frizzell is the embodiment of our firm's commitment to bringing the Power of More® to every client," said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner. *"In transactional engagements that are almost always complex, with a multitude of time-*



sensitive details, Rich has proven himself to be the ultimate trusted advisor who is adept at controlling and managing the process.”

Congratulations on this well deserved promotion, Rich!

[READ THE FULL PRESS RELEASE](#)



Venice Williams Promoted to Tax Director at Gray, Gray & Gray



Gray, Gray & Gray is elated to announce that [Venice Williams, CPA, MST](#) has been promoted to Director of Tax. Her new role will include responsibility for strategic tax planning, ensuring tax compliance, management of internal tax teams, and fostering the development of client relationships across a wide range of industries.

“Venice Williams is a rising star in the tax world, and one of the reasons our firm enjoys such a sterling reputation among clients and the broader business community,” said James DeLeo, MBA,

CPA/MST, Gray, Gray & Gray’s Leading Partner.

Congratulations on this well deserved promotion, Venice!

[READ THE FULL PRESS RELEASE](#)



Congratulations to Our Newly Promoted Gray, Gray & Gray Team Members!

Congratulations on your well-deserved promotions and thank you for leading by example with your dedication to doing MORE for clients and fellow team members.

“We are very pleased to announce the well-deserved promotions of these seven exceptional individuals,” said Gray, Gray & Gray’s Leading Partner, James DeLeo, MBA, CPA/MST. *“Their dedication, expertise, and commitment to our clients have been instrumental in our firm’s continued success. We look forward to their continued contributions as they take on these expanded roles.”*



Jacob Barrett
Sage Intacct & Advisory
Manager



Nivetha Baskar
Transaction Advisory Services
Senior Analyst



Patricia Matthews
Tax
Senior Bookkeeper



Michael Miano
Audit
Manager



Xiaoyi Peng
Sage Intacct & Advisory
Senior Manager



Lexi Pereira
Audit
Senior Staff Accountant



Kevin Sheehy
Tax
Manager

Company headshots by David Shopper

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