



Designing & Building Your Future

A Blueprint for
Growth & Profitability.

March 2025 Issue

THIS MONTH! Register for 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 month's conference will cover 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. Our very own Leading Partner, Jim DeLeo, is pleased to be moderating the following session. Check out the full session details below!



Inside the Deal: A 360° View of Growth & Partnership (11:00-11:40am)
Moderator: [Jim DeLeo](#), Leading Partner, Gray, Gray & Gray

Panelists: [John Gardella](#), Shareholder, CMBG3 Law; [Dan Geron](#), Principal, Geron Group LLC; [Chris LeRoy](#), Managing Director, Truck 9 Partners; [Martin Mazzella](#), President, Ti-SALES, Inc.; [Kevin McCarthy](#), Managing Director, Truck 9 Partners

Go behind the scenes of a strategic investment designed to fuel growth and expand business opportunities. Hear how a leadership team retained significant ownership while bringing in a capital partner to drive value creation and operational excellence. We'll explore how both sides structured the deal, navigated key decisions, and aligned on a shared vision for long-term success. Whether you're a buyer, seller, or investor, you'll learn key insights into building partnerships that accelerate growth without sacrificing continuity.

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

2024 BSA Design Awards

The Gray, Gray & Gray team was pleased to attend the 2024 Boston Society for Architects (BSA) Design Awards, which celebrates exemplary innovation in the built environment, investment from committed clients, and the unique power of architecture to design buildings and spaces that transform communities and shape the way we live. **Congratulations to the following g3 clients on their well-deserved awards!**

designLAB

Award: Built Design Excellence, Adaptive Reuse, Renovation or Historic Preservation
Project: Curley Community Center

Award: Built Design Excellence, Educational Facilities
Project: Quinnipiac University Health and Wellness Center

Flansburgh Associates

Award: Built Design Excellence, Educational Facilities
Project: The Governor's Academy, Bill '67 and Peter '71 Alford Coastal Research Center

Klopfer Martin Design Group

Award: Unbuilt Planning and Design, Conceptual
Project: Parkland 17 Memorial

Merge Architects, Inc.

Award: Built Design Excellence, Housing – Honor Award
Project: Jackson Hole Workforce Housing



g3 Team (pictured from left to right): Thomas Feinsmith, Tax Supervisor; Patricia Matthews, Senior Bookkeeper; Marty Prendergast, Tax Senior Manager; Lisa Sullivan, Bookkeeping Manager; Kevin Howley, Partner; Adam Faria, Tax Senior Staff Accountant

[LEARN MORE](#)

Latest Decision Creates New Deadline for Corporate Transparency Act Compliance



The on-again/off-again requirement for businesses to file a report of Beneficial Ownership Interest (BOI) to comply with the Corporate Transparency Act (CTA) is on again.

A series of back-and-forth injunctions in a Texas federal court has left companies unsure about when to file their corporate information with the Financial Crimes Enforcement Network (FinCEN). The latest court decision, announced on February 18, 2025, has reinstated the CTA's filing requirement after a pause of several weeks.

LEARN MORE

Webinar Recording Now Available!

We officially kicked off "The Power of Connection" webinar series with Demystifying Integrations and Automations! Thank you to everyone who joined in our session. **In case you missed this webinar or would like a refresher on the information shared, you can now access the recording online.** During this 30-minute session, we take a "big picture" approach to introduce you to software integrations as well as API basics which are the building blocks of integration. Check out a sneak peek of our first webinar of the series [HERE](#)!



Looking for more? The webinar series continues on April 22 with our next session, Integration Methods and Data Approaches! Learn more and register for upcoming webinars [HERE](#).

ACCESS RECORDING

Celebrating Women's History Month at g3

As a firm with a rich history spanning over 80 years, we deeply value the contributions of the women at g3. We take this time to honor and appreciate their unique stories, which have made a significant mark on our firm. We are proud to announce that the following team members have been featured in Boston Business Journal's People on the Move in celebration of Women's History Month. Please join us in recognizing them for these well-deserved features, serving as inspirational examples of women in the industry!

- [Alison Burgett, Chief People Officer](#)
- [Pamela Cedrone, CAAS Director](#)
- [Aki Goto, Audit Senior Manager](#)
- [Laura Hampe, Marketing Director](#)
- [Jaclyn Linehan, Tax Senior Manager](#)
- [Venice Williams, Tax Director](#)



Alison Burgett



Pamela Cedrone



Aki Goto



Laura Hampe



Jaclyn Linehan



Venice Williams



Maximizing the Lifetime Exemption Before 2026

As we approach a significant change in federal estate tax law, many Americans with substantial estates need to consider strategic financial planning. The scheduled reduction in the lifetime gift and estate tax exclusion presents both challenges and opportunities for wealth preservation. Here's what high-net-worth individuals should understand about navigating this transition.



[LEARN MORE](#)



How Candidates Can Benefit from 179D Before Possible Tax Reform

by Jesse Stanley of KBKG



For years, commercial building owners, architects, engineers, and other designers have benefited from legislation that has rewarded them for their sustainable work with significant tax incentives from programs like the 179D Tax Deduction. As uncertainties about possible tax reform remain, capitalizing on the current policy can result in design firms maximizing their tax savings, boosting their overall business.

[READ THE FULL ARTICLE](#)

Top 5 Findings in a Royalty Audit



As a forensic accountant specializing in royalty audits for over two decades, Kevin Howley has encountered numerous instances where licensees or franchisees fall short of their contractual obligations. While each audit presents unique challenges, certain issues consistently emerge across industries and agreement types. Understanding these common findings can help both licensors/licensees and franchisors/franchisees better manage their relationships and ensure compliance with their agreements.

[READ THE FULL ARTICLE](#)

Announcing New Gray, Gray & Gray Team Members

We are pleased to welcome the following new team members.



Juliana Agnitti
Tax
Intern



Paul Alfonso
Tax
Intern



Anastasios Aslanidis
Tax
Intern



Thomas Feinsmith
Tax
Supervisor



Sairy Gonzalez-Amador
Tax
Intern



Sarah Hayes
Sage Intacct & Advisory
Consultant



Richard Wilz
Tax
Intern




Mark Zhukov
Tax
Intern

Do you have a colleague that would like to receive our news?

SUBSCRIBE HERE

Gray, Gray & Gray, LLP | www.gggllp.com | 781.407.0300



 Share This Email

The information contained in this communication (including any attachments and/or re-directs to other online sources) is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

Copyright © 2025. All Rights Reserved.