



July 2025 Issue

## One Big Beautiful Webinar

### ONE BIG BEAUTIFUL WEBINAR

Everything you need to know about the new tax bill.



WEDNESDAY, JULY 30, 2025  
10:00 - 11:00 AM

#### FEATURING



Kelly Berardi  
J.D., LL.M.



Derek Rawls  
CPA, MST



Brad Carlson  
CPA

REGISTER TODAY!

### Ready to unpack the multiple changes included in the recently enacted One Big Beautiful Tax Bill?

Join the tax leaders from Gray, Gray & Gray as they explore the bill that seems to have something in it for everybody. [Kelly Berardi, JD, LL.M.](#), [Derek Rawls, CPA, MST](#), and [Brad Carlson](#) will dive into the many updated regulations and rates on both the corporate and individual taxpayer sides, with a special emphasis on new tax strategies you can implement now to help you save later.

REGISTER HERE

## Thank You to Our 2025 Energy & Propane Industry Survey Participants!

Thank you to everyone who took part in our Annual Energy & Propane Industry Survey. We appreciate your input, which helps us to develop a “snapshot” of the retail oil and propane industry, assisting you with measuring the growth and development of your business.



**Survey Results Coming This Fall!**

## Happy Independence Day from Gray, Gray & Gray



We hope our team, clients, and friends of the firm enjoy a wonderful and safe holiday.

As a reminder, Gray, Gray & Gray will be closed Friday, July 4, 2025 and will reopen on Monday, July 7, 2025 in observance of the holiday.

## Gray, Gray & Gray Among Top 100 Largest Private Companies in MA

The Boston Business Journal ranked Gray, Gray & Gray 99<sup>th</sup> among the Top 100 Largest Private Companies in Massachusetts, based on annual revenues of \$38 million.



*"Being named one of the Top 100 businesses in the state is something we're incredibly proud of. But at the end of the day, it all comes down to the people — our amazing clients who trust us with their businesses, and our hardworking team who show up every day ready to deliver The Power of More,"* says James DeLeo, MBA, CPA/MST, Leading Partner at Gray, Gray & Gray.

READ THE FULL PRESS RELEASE

# Oil & Energy Features "8 Strategies for Effective Wealth Transfer in a Business Succession"

## Article by Gray, Gray & Gray's Marty Kirshner

In this article, Marty shares eight lessons from successful companies, providing advice on how businesses can ensure a smooth transition of leadership, ownership, and wealth, thereby preserving their legacy and laying the foundation for continued success for future generations.



[READ THE FULL ARTICLE](#)



# Butane-Propane News (BPN) Features Article

## by Gray, Gray & Gray's Rob Levene



We are pleased to announce that Rob Levene has been featured in Butane-Propane News with the article, *"Winter Diagnostics for Your Propane Operations"*. In this article, Rob shares helpful questions to guide your winter review and position your team for greater success going forward.

[READ THE FULL ARTICLE](#)



# The Check is NOT in the Mail - Federal Government

## Shifting to Electronic Payment

On March 25, 2025, President Trump signed an executive order mandating the federal government cease issuing paper checks for all disbursements by September 30, 2025. This comprehensive directive affects all federal payments including tax refunds, Social Security benefits, veterans' benefits, vendor payments, and intragovernmental transfers.



[LEARN MORE](#)



## Upcoming Events

We are pleased to announce our participation in the following events.

**Crossroads Expo: Texas Propane Gas Association**  
**August 7-9, 2025**  
**Moody Gardens Hotel and Convention Center, Galveston, TX**

Be sure to visit Gray, Gray & Gray's booth (#802) at next month's event.



**NEFI HEAT Show**  
**August 20-22, 2025**  
**Encore Boston Harbor Hotel, Everett, MA**

Be sure to visit Gray, Gray & Gray's booth (#607) at next month's event. We will also be presenting the following session:



### **Fulfilling the Strategic Planning Imperative**

*Presenters: Marty Kirshner, CPA, MSA, Partner, Gray, Gray & Gray, LLP; Bryan Pearce, Director, Gray, Gray & Gray, LLP, Rob Levene, Director, Gray, Gray & Gray, LLP*

A one-hour moderated panel discussion on creating a vision and defining a pathway toward sustained growth and resiliency for propane and heating oil marketers. The objective is to provide clear and manageable steps for developing a multi-year plan of action that will build an organization with capability of continuing growth and profitability, with the flexibility to adapt to rapidly shifting market conditions. Attendees will leave with a clear framework for creating or refining their strategic plans, tailored to the unique challenges of the fuel delivery industry.



## How to Use Simulated Phishing in Cyber Security Training



Simulated phishing has become an essential component of comprehensive security training programs. This practice isn't just for enterprise-level organizations – businesses of all sizes can and should implement phishing simulations to strengthen their security posture and meet compliance requirements.

[READ THE FULL ARTICLE](#)



## Senate Proposes Making

# Opportunity Zone Credit Permanent

The Senate Finance Committee's reconciliation bill proposes to permanently renew and enhance the Opportunity Zone program. This represents a significant expansion from the House version, which only extends the program through 2033.



LEARN MORE



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

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