



Designing & Building Your Future

A Blueprint for
Growth & Profitability.



February 2026 Issue

Announcing the Smart Business Dealmakers Boston Conference on March 5th

The Smart Business Dealmakers Conference connects thousands of local entrepreneurs, investors and advisers for a day of dynamic content and networking in top U.S. business markets. 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. Gray, Gray & Gray's Leading Partner Jim DeLeo and Partner Rich Frizzell will also be co-leading a panel discussion on preparing for a thoughtful exit.



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

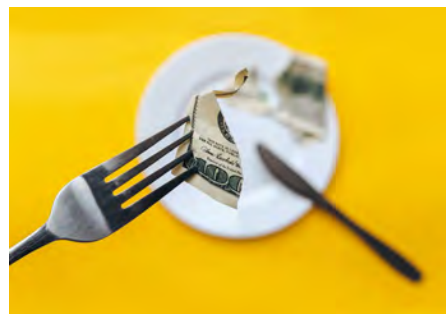
REGISTER TODAY

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IRS Takes a Bite Out of Meal Deductions

Understanding the 2026 Changes to Employer-Provided Food and Beverage Expenses

Due to a combination of new legislation and the expiration of key provisions of the Tax Cuts and Jobs Act, tax deductions have been eliminated for many common food-related employee benefits - meals, snacks, and beverages provided to employees. Businesses must reassess long-standing practices to remain compliant while managing rising after-tax costs.



LEARN MORE

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How the No Tax on Overtime Rules Could Impact Your Business



The One Big Beautiful Bill Act introduced a significant federal tax deduction for overtime pay, which will affect how many organizations manage payroll and reporting. Click below to learn what business owners need to know.

LEARN MORE

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Venice Williams Elected Partner at Gray, Gray & Gray

It is our sincere pleasure to announce that [Venice Williams, CPA, MST](#) has been elected a partner at Gray, Gray & Gray!



"This well-deserved promotion recognizes Venice's outstanding contributions to the firm and her exceptional service to clients over the years," said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner. "Her ability to navigate a complicated tax landscape while building strong internal and external relationships alike has been invaluable to our firm's success."

[READ THE FULL PRESS RELEASE](#)



Xiaoyi Peng Promoted to Director of Implementation Services at Gray, Gray & Gray

We are excited to announce that [Xiaoyi Peng, CPA](#), has been promoted to Director of Implementation Services in the firm's Sage Intacct & Advisory practice group. In her new role, Peng will oversee the firm's work with clients in upgrading their accounting and business automation systems, including the Sage Intacct enterprise accounting platform.

"Xiaoyi Peng has played a leading role in building our rapidly growing software advisory and implementation practice," said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner. "Xiaoyi's depth of technical knowledge, in combination with her accounting background, is the perfect formula for providing practical guidance for organizations seeking to take advantage of the advancements being made in financial management software."



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Gray, Gray & Gray Promotes Ten Team Members

We are pleased to announce the promotion of ten team members in recognition of their outstanding contributions and continued dedication.

"I'm thrilled to announce the promotion of these exceptional team members whose dedication and expertise have been instrumental to our firm's success," said Gray, Gray & Gray's Leading Partner, James DeLeo, MBA, CPA/MST. "Their commitment to excellence and client service exemplifies the values that have made our firm the preferred choice for those

seeking forward-looking guidance for their organizations. Congratulations to each of them on this well-deserved achievement."

CONGRATULATIONS to Our Newly Promoted Team Members



Melinda Aaronson
Marketing
Specialist



Maxwell Bowden, CPA
Tax
Manager



Stephanie Carabine
CAAS
Supervisor



Sarah Hayes
Sage Intacct & Advisory
Customer Success Manager



Shari Kent
HR
Senior Learning &
Development Specialist



Xiaoyi Peng, CPA
Sage Intacct & Advisory
Director of Implementation
Services



Laura Pollis
Marketing
Senior Coordinator



Logan Scarlotta, MSA
Audit
Senior Staff Accountant



Christin Schow
Support
Office & Special Projects
Administrator



Zachary Wensley, MSA
Audit
Supervisor

Company headshots by David Shopper

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Announcing New Gray, Gray & Gray Team Members

We are pleased to welcome the following new Gray, Gray & Gray team members.



Joseph Gatto
Tax
Intern



Peter Jurovich
Tax
Intern



Mike Kokoros, CPA
Audit
Supervisor



Linda Lotti, CPA
Sage Intacct
Senior Consultant



Sean McGivern
Audit
Staff Accountant



Heather Morse, CPA
Audit
Director



William O'Malley
Tax
Intern



Rusbel Castillo Perello
Tax
Intern



Tim Sacca, CPA
Audit
Staff Accountant



Alyson Sampson, CPA
Audit
Manager



Elisabeth Stapelfeld
Audit
Intern



Meghan Stravin
Tax
Processing Coordinator

Heather Morse Joins Gray, Gray & Gray as Audit Director

We are elated to announce that [Heather Morse, CPA](#), has joined Gray, Gray & Gray as a Director in the Audit & Assurance department. In her new role, Morse will oversee complex audit engagements, manage client relationships, and ensure the delivery of high-quality assurance services that meet regulatory standards and client expectations.



"We are very fortunate to have a professional with Heather's expertise and experience join our team," said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner. "Heather has a proven track record of success in guiding and advising clients, and in using audit data to help reveal a more confident path forward."

[READ THE FULL PRESS RELEASE](#)



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