



February 2026 Issue

Help Us Help You! Share Your Question Suggestions for Our 2026 Energy & Propane Industry Survey

Our 35th annual survey is coming soon and we want
to hear your question suggestions!

At Gray, Gray & Gray, we are committed to bringing you key information to fuel your success, including our annual industry survey which provides vital information on fuel oil and propane industry standards of performance. For over three decades, your participation in our survey has been critical for developing a "snapshot" of the retail oil and propane industry. Your feedback is important! Provide your question suggestions today to assist us in building a thoughtful industry survey, establishing industry benchmarks and the standards by which company performance is measured.



Please email your suggestions to us at info@ggllp.com by February 17th.

SUBMIT QUESTION SUGGESTIONS



Gray, Gray & Gray Featured in LP Gas Magazine



We are pleased to share that Gray, Gray & Gray's [Marty Kirshner](#) and [Carl Kaplan](#) were recently featured in LP Gas Magazine in a video interview recorded at the 2025 LP Gas Growth Summit.

In the discussion, Marty and Carl explain how our propane-focused CPA and advisory team helps retailers strengthen their businesses through comprehensive valuations, M&A guidance, and technology upgrades designed to improve efficiency and fuel growth.

[WATCH THE FULL INTERVIEW](#)



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](#)



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](#)



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."*

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

We are excited to announced 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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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



Announcing New Gray, Gray & Gray Team Members

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



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

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