



March 2026 Issue

**COMING SOON!**  
**Gray, Gray & Gray's 35th Annual  
Energy Industry Survey**

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, and we look forward to bringing you the 2026 edition next month!

*Please watch your inbox for this year's survey coming soon!*



## Oil & Energy Magazine features "Financial Forecasting For Fuel Delivery Companies" article By Gray, Gray & Gray's Marty Kirshner



*Companies that master forecasting consistently outperform their peers in profitability, growth, and market position.*

Running a heating oil or propane delivery business without robust financial forecasting is like operating your delivery trucks without GPS in unfamiliar territory. You might eventually reach your destination, but you will waste time and money along the way. For mid-size energy companies facing increasingly complex market dynamics, financial forecasting is not just helpful; it is mission-critical for sustainable growth and profitability.

[READ THE FULL ARTICLE](#)



# :FuelExchange™

is pleased to announce:



## :FuelExchange™

FULL M&A SERVICES FOR PROPANE, FUEL OIL, HVAC & PLUMBING COMPANIES

A Service of Gray, Gray & Gray, LLP

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**Catherine Erasmus, Taylor Energy:** *"The acquisition of Wilson-Norige and Mobile Mix Concrete was important to me, and having the right people involved mattered. FuelExchange helped guide the process in a way that was thoughtful and organized. Equally important was working with Jeff [Morin], the prior owner of Wilson-Norige and Mobile Mix Concrete. From the very beginning, Jeff and I shared a common understanding of what truly matters in a company: building a strong culture for employees and delivering consistent, high-quality customer care. That alignment made the transition cooperative, respectful, and ultimately successful. This was more than just a*

transaction. It was a smooth and intentional transition of businesses with strong values, and I'm grateful to everyone involved for their competence, transparency, and commitment throughout the entire process."

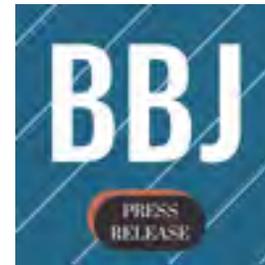
Learn about this and other recent FuelExchange deals [HERE](#).

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## Gray, Gray, & Gray Ranked Among Top Massachusetts Accounting Firms by Boston Business Journal

We are pleased to announce that Gray, Gray & Gray has been ranked as the 20th largest accounting firm in Massachusetts by the Boston Business Journal! The publication's annual rankings are based on the size of the firm's professional staff in the state and include both independent firms and regional offices of large national accounting firms.



*"By investing in our team's growth and fostering a culture of innovation, we've built something that no ranking can fully capture, a firm that genuinely understands the unique needs of those we work with and delivers tailored solutions that drive real results."* said James DeLeo, MBA, CPA/MST, Leading Partner at Gray, Gray & Gray.

[READ THE FULL PRESS RELEASE](#)

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## Upcoming Events

We are pleased to announce our participation at the following spring events.

**NPGA Southeastern Convention & International Propane Expo**  
**April 19 - 21, 2026**  
Music City Center, Nashville, TN

Be sure to visit Gray, Gray & Gray's booth (#508) at this year's expo. We will also be co-presenting the following session:

**Turning Data into Strategy: National Propane Survey Review**

Sunday, April 19, 2026, 12:30 pm - 1:45 pm

*Presenters: Marty Kirshner, CPA, MSA, Partner, Gray, Gray & Gray, LLP; Philip Baratz, CEO & Co-Founder, Angus Energy; Barrett Conway, Managing Director, Cetane Associates; Richard Goldberg, President, Warm Thoughts Communications; Bruce Spiridonoff, COO, SH Tevis & Son*

Back by popular demand, an all-star panel of industry experts will examine, explain and analyze the results of the latest national Propane Survey conducted by Gray, Gray & Gray. The data itself is fascinating and provides valuable insights into the state of the industry. But its real value lies in how the results can inform strategic decision making that can impact an individual business.



**Eastern Energy Expo**  
May 17 - 20, 2026  
Mohegan Sun, Uncasville, CT



Be sure to visit Gray, Gray & Gray's booth (#211) at this year's expo. We will also be presenting an informational session - more details to come!

And MORE!



## Get to Know Our New Audit Director Heather Morse

We're thrilled to introduce Heather Morse, our new Audit Director who joined Gray, Gray & Gray in January 2026. With 20+ years of Big Four experience, Heather shares why she chose g3—from the genuine connections she felt during the interview process to the collaborative, people first culture she's experienced since day one. Hear straight from Heather about the value of mentorship, the benefits of joining an independent firm, and how our flexible work environment supports her life as a busy mom.



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## Celebrating Women's History Month at g3

We are pleased to celebrate Women's History Month, which serves as an opportunity to honor all of the remarkable women who have shaped our firm's legacy and continue to drive our success. Their dedication to both professional and personal growth inspires us each and every day!

This year, we are proud to announce that the following team members have been featured in Boston Business Journal's "People on the Move" in honor of Women's History Month. The features highlight their unique backgrounds and experience.

- [Colby Dondero, Senior Manager](#)
- [Xiaoyi Peng, Director of Implementation Services](#)

- [Venice Williams, Partner](#)



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

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