



January 2025 Issue

Recording Available! Gray, Gray & Gray's Year End Planning Seminar

In case you missed our recent seminar or would like a refresher on the information shared, you can now access the recording and copy of the presentation online.

Check out the recording and get fired up for 2025 with information and inspiration designed to give you a head start on developing the strategies and tactics to grow and prosper in the New Year. Click below to access now.



[ACCESS THE SEMINAR RECORDING & PRESENTATION](#)



Oil & Energy Magazine features "10 Ways to Leverage Advanced Analytics to Boost Profits" article By Gray, Gray & Gray's Marty Kirshner



Energy dealers looking to position their companies for sustainable growth and success will do well by harnessing the potential of data-driven insights. Let's look at 10 ways a dealer can leverage available software and analytics tools to optimize operations, enhance customer service, and ultimately boost the bottom line.

[READ THE FULL ARTICLE](#)

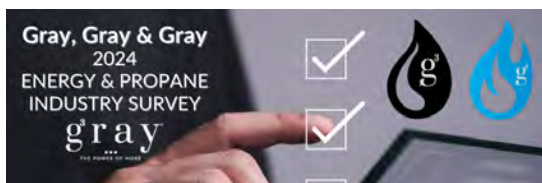
Corporate Transparency Act Blocked Again

In a rapid turnabout, the U.S. Court of Appeals for the Fifth Circuit has reinstated a nationwide injunction that temporarily blocked the enforcement of the Corporate Transparency Act's (CTA) beneficial ownership information reporting requirements. This latest ruling effectively pauses the implementation of these requirements for small businesses across the country while the court conducts a thorough review of the government's appeal.



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LPGas Magazine features "Results of tank-related survey questions" article



Gray, Gray & Gray's annual propane industry survey serves as a benchmark for propane marketers throughout the United States.

Click below for a summary of survey results from the firm's tank-related questions.

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Major Change to Massachusetts Estate Tax

Massachusetts has enacted significant changes to its estate tax calculation through Bill H.4799, marking a substantial shift in how non-Massachusetts real estate and tangible personal property is treated for tax purposes. This reform brings welcome clarity and potential tax savings for Massachusetts residents with out-of-state property holdings.



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Social Security's Role in Income Planning for Retirement



Nearly 70 million Americans receive Social Security benefits as of 2024, making it one of the most significant social insurance programs in the United States. An estimated 11,000 Americans will reach age 65 daily through 2027, reflecting the ongoing retirement of the Baby Boomer generation. For many of those retiring, Social Security likely represents a significant source of income.

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