

THE POWER OF MORE

# NEWS & UPDATES

Welcome to Gray Gray & Gray's Sage Intacct newsletter where we provide helpful insights and information on the many great benefits of the Sage Intacct solution, and ways you can realize their usefulness.

## What A Year! Looking Back on 2024



We are filled with gratitude for all of the moments that defined 2024. We celebrated our team through busy season lunches, holiday celebrations, our summer outing, and more. Focusing on continuous learning, we conducted many informative and engaging Gray Academy courses (and brought back more in-person opportunities!). Networking and industry involvement took place throughout the year, with a range of seminars, conferences, tradeshow, and speaking engagements, both near and far. And we gave back to our community in various ways, including our day of service, school supplies drive, the Jimmy Fund Walk, among other impactful charitable efforts. What else made the past year so memorable? **Watch our 2024 recap video [HERE](#) for more highlights!**

## Richard Frizzell Elected Partner



It is our sincere pleasure to announce that [Richard Frizzell, CPA, MSA](#) has been elected a partner in Gray, Gray & Gray's Transaction Advisory Services practice, which assists businesses contemplating a sale or an acquisition.

*"Rich Frizzell is the embodiment of our firm's commitment to bringing the Power of More® to every client,"* said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner. *"In transactional engagements that are almost always complex, with a multitude of time-sensitive details, Rich has proven himself to be the ultimate trusted advisor who is adept at controlling and managing the process."*

Congratulations on this well deserved promotion, Rich!

[READ THE PRESS RELEASE HERE](#)

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## Venice Williams Promoted to Tax Director



Gray, Gray & Gray is elated to announce that [Venice Williams, CPA, MST](#) has been promoted to Director of Tax. Her new role will include responsibility for strategic tax planning, ensuring tax compliance, management of internal tax teams, and fostering the development of client relationships across a wide range of industries.

*"Venice Williams is a rising star in the tax world, and one of the reasons our firm enjoys such a sterling reputation among clients and the broader business community,"* said James DeLeo, MBA, CPA/MST, Gray, Gray & Gray's Leading Partner.

Congratulations on this well deserved promotion, Venice!

[READ THE PRESS RELEASE HERE](#)

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**Congratulations to Our Newly Promoted Gray, Gray & Gray Team Members!**



**Jacob Barrett**  
Sage Intacct & Advisory  
Manager



**Nivetha Baskar**  
Transaction Advisory Services  
Senior Analyst



**Patricia Matthews**  
Tax  
Senior Bookkeeper



**Michael Miano**  
Audit  
Manager



**Xiaoyi Peng**  
Sage Intacct & Advisory  
Senior Manager



**Lexi Pereira**  
Audit  
Senior Staff Accountant



**Kevin Sheehy**  
Tax  
Manager

*Company headshots by David Shopper*

Congratulations on your well-deserved promotions and thank you for leading by example with your dedication to doing MORE for clients and fellow team members.

“We are very pleased to announce the well-deserved promotions of these seven exceptional individuals,” said Gray, Gray & Gray’s Leading Partner, James DeLeo, MBA, CPA/MST. “Their dedication, expertise, and commitment to our clients have been instrumental in our firm’s continued success. We look forward to their continued contributions as they take on these expanded roles.”

[READ THE PRESS RELEASE HERE](#)

### Transform Your Financial Planning & Analysis with Martus



Gray, Gray & Gray now offers a powerful financial management solution through our partnership with Martus, a cutting-edge Financial Planning & Analysis platform. Martus seamlessly integrates with and leverages your existing Sage Intacct ERP system. This powerful combination allows us to offer a comprehensive financial management solution that streamlines planning, budgeting, and forecasting processes.

[LEARN MORE HERE](#)

### Sage Intacct Demo with Q&A



### Coffee Break Demo

Learn how Sage Intacct helps you drive business performance from multi-entity consolidation in minutes to powerful, yet easy-to-use cloud budgeting and planning software.

[REGISTER NOW](#)

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### Sage Intacct Construction Demo Plus Live Q&A



### Coffee Break Demo

Learn how Sage Intacct Construction, the only native-cloud construction financial management solution, helps manage multiple entities with ease, gain real-time insights into business drivers, and distribute environments/scalability.

Learn more about the expansion of Sage construction cloud suite with the launch of Sage Construction Management. Read the full [press release here](#).

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### Additional Upcoming Sage Webinars

#### CFO Roundtable: Strategies to Implement in 2025

January 28 at 2:00 PM EST

[REGISTER HERE](#)

#### Mission-Critical: Elevation the Role of Nonprofit Finance Leader

February 4 at 2:00 PM EST

[REGISTER HERE](#)

#### Healthcare Finance Leaders' Top Strategies for 2025

February 5 at 2:00 PM EST

[REGISTER HERE](#)

#### Storytelling with Data for Every Stakeholder

February 11 at 2:00 PM EST

[REGISTER HERE](#)

#### Mission Synergy: Aligning Finance and Fundraising for Greater Impact

February 19 at 2:00 PM EST

[REGISTER HERE](#)

#### The Rise of AI in Modern Finance

February 25 at 2:00 PM EST

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### Team Member Spotlight: Caroline Beatty, MSCM

Caroline provides end-to-end service in system design, implementation, administration and training to assure a smooth and stress-free transition from legacy accounting and financial management systems to the powerful Sage Intacct platform. Her deep experience in non-profit accounting gives Caroline a particular proficiency in the complex reporting and accounting requirements.

Prior to joining Gray, Gray & Gray, Caroline served as Director of Accounting and Parish Assistance for the Diocese of San Bernardino, California. In this role she led the implementation of a system wide adoption of Sage Intacct.



[cbeatty@gggllp.com](mailto:cbeatty@gggllp.com)

Caroline is a graduate of New Mexico State University, where she earned a Bachelor's Degree in Business Administration; and Villanova University, where she earned a Master's Degree in Church Management. In her free time Caroline enjoys playing the piano, quilting, watching movies with her husband and son, and playing with Archie, her golden retriever.

**Interested in learning more about the Sage Intacct Solution from Gray, Gray & Gray?**

[Schedule a Consultation](#)

**Do you know anyone that could use Gray, Gray & Gray's assistance?**

[Submit a Referral](#)

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Gray, Gray & Gray, LLP | The Power of More  
150 Royall Street, Suite 102 | Canton, MA 02021

Web: [www.gggllp.com](http://www.gggllp.com) | Phone: 781.407.0300 | Email: [thepowerofmore@gggllp.com](mailto:thepowerofmore@gggllp.com)

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