

Dana L. Mark

Partner | New York

Dana L. Mark is a Partner in the Private Wealth Services Practice in Smith, Gambrell & Russell's New York office.

Ms. Mark focuses her practice on tax, estate and trust planning, charitable giving, and tax-exempt organizations. She has extensive experience involving sophisticated tax planning, the probate and administration of estates and trusts, qualified retirement plan assets and IRAs, and the preparation of pre- and post-nuptial agreements. Dana advises executors and trustees in the administration of estates and trusts from the initial probate to the preparation of estate tax returns, fiduciary income tax returns, the preparation of accountings, and the settlement of the estate or trust. She also represents beneficiaries.

Dana has assisted families with the tax-efficient transfer of wealth, including planning matters involving the family businesses. She works closely with family advisors in designing and implementing succession plans. Dana also provides advice to charitable organizations and in connection with the establishment and operation of tax-exempt organizations.

Ms. Mark is a Fellow of the American College of Trust and Estate Counsel. She is a member of the American Law Institute where she is on the Members Consultative Group of the Principles of the Law of Nonprofit Organizations, Restatement Third, Property (Wills and Other Donative Transfers) and Restatement Third, Trusts. She is also a member of the American Bar Association and its Section of Taxation and Section of Real Property, Probate and Trust Law, the New York State Bar Association and its Section of Taxation and the Trusts and Estates Law Section, the City Bar, and the Society of Trust and Estate Practitioners (STEP).

Dana is a Member of the Board of Directors of the Ovarian Cancer Research Fund Alliance, serves on its Executive Committee, and heads the Governance Committee, she is a Member of the Board, Vice-President and Treasurer of Animal Zone International, and a member of the Board of Trustees of St. Jean Baptiste High School in Manhattan.



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Areas of Practice

Private Wealth Services

Bar Admissions

New York

Recognitions

2019 Super Lawyers
Super Lawyers, Top 50 Women
Lawyers in New York
Best Lawyers, New York Trust
and Estates
The Best Lawyers in America©,
Trusts and Estates

Ms. Mark has been recognized in US News & World Report and Best Lawyers in New York Trust and Estates and has been named by Super Lawyers as one of the top 50 women lawyers in New York. She is also listed in The Best Lawyers in America©. In addition, she has been selected as a 2019 New York-Metro Super Lawyer.

Dana has also lectured and written extensively on tax and trust and estate planning. After her family, Dana's passion lies in solving puzzles and seeking solutions to tax and trust and estate issues.