



Dana L. Mark

Partner | New York

dmark@sgrlaw.com

Tel: 212-907-9758

Fax: 212-907-9858

Areas of Practice

Private Wealth Services | Trusts and Estates | Tax Law | Non-Profit Organizations | Art Practice

Dana L. Mark is a Partner in, and the Head of the Private Client Services Practice in Smith, Gambrell & Russell, LLP's New York office.

After her family, Dana's passion lies in solving puzzles, including seeking solutions to tax and trust and estate issues.

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 probate to the preparation of estate tax returns, fiduciary income tax planning, the preparation of accountings, and the settlement of the estate or trust. She also advises beneficiaries concerning their interests in an estate or trust.

She guides her clients in the preparation of their Wills and other estate planning documents, helping to fulfill personal and philanthropic goals and to pass wealth tax efficiently. Dana has assisted families with matters involving the family businesses, working 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, a member of the American Law Institute, and a member of Attorneys for Family-Held Enterprises (AFHE). 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 Alliance, Emeritus Member of its Executive Committee, and heads the Governance Committee, a member of the Board of Trustees of St. Jean Baptiste High School in Manhattan, a member of the Board of Trustees of the ACE Scholarship Foundation of NY, and a Member of the Board of Animal Zone International.

Ms. Mark has been recognized in *US News & World Report*, *Best Lawyers* in New York and *Super Lawyers* and named on the *Top 50: 2022 Women New York-Metro Super Lawyers* list.

Dana has also lectured and written extensively on tax and trust and estate planning.

Admissions

New York
U.S. Tax Court

Memberships

Fellow, American College of Trust and Estate Counsel
Member, American Law Institute
Member, Attorneys for Family-Held Enterprises
Member, Society of Trust and Estate Practitioners
Member, American Bar Association
Member, City Bar
Member, New York State Bar Association
Board Member, Ovarian Cancer Research Alliance
Board Member, St. Jean Baptiste High School
Board Member, ACE Scholarship Foundation of NY
Board Member, Animal Zone International

Recognitions

New York-Metro Super Lawyers (2006-2022)
Super Lawyers, Top 50 Women Lawyers in New York
The Best Lawyers in America®, Trusts and Estates, New York (2007-2026)