



## **Dana L. Mark**

Partner | New York

[dmark@sgrlaw.com](mailto: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 the Private Client Services Practice in Smith Gambrell Russell'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

**Continued**

---

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