

SES ESOP Strategies

A STEVENS & LEE COMPANY



Mark B. Russell

Head of Finance

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Mark is head of the finance group at SES ESOP Strategies, a Stevens & Lee Company, and a Senior Managing Director at Griffin Financial Group where he works with clients and their principals, providing M&A advisory services and private placements of debt and capital. He works extensively with business owners, evaluating their business and personal situations and assisting in preparing for succession of or exit from their businesses by performing an exhaustive analysis of alternatives (including management buyouts, ESOPs, recapitalizations, and minority or majority sales of the business) to ensure business owners have all of the information necessary to decide the best path to achieve their goals. Finally, he assists business owners in optimizing the strategies designed to achieve the desired outcome.

As a non-practicing CPA and a lawyer, Mark's background provides an important link between clients and their accountants and lawyers to creatively address accounting, tax and financial planning issues.

Mark is a former National Tax-Product Development Manager for PricewaterhouseCoopers, LLP in Washington, D.C., where he was responsible for conceiving creative corporate tax planning strategies and analyzing publicly available information to determine the applicability of those strategies. He was also responsible for implementing large projects and coordinating project teams and corporate personnel.

Mark is a Certified Financial Planner (CFP) and a Certified Exit Planning Advisor (CEPA®). He holds Series 79, 7 and 66 licenses from FINRA.

Education

- Georgetown University Law Center, LL.M. in Taxation, with distinction, 1996
- Texas Tech University School of Business, MBA, 1995
- Texas Tech University School of Law, J.D., 1995
- Texas Christian University, BBA in Accounting, 1992

Memberships/Affiliations

- The ESOP Association

- The National Center for Employee Ownership
- The Exit Planning Institute
- Texas Center for Employee Ownership, Organizational Board Member and Treasurer