

# Stevens & Lee

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## Mark B. Russell

Of Counsel

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Reading

817.566.1013

### Practice

Corporate, Finance and Capital Markets

ESOPs – Employee Stock Ownership Plans

Mark concentrates his practice in a number of areas of finance and tax law, with an emphasis on Employee Stock Ownership Plans. He has experience in dealing with the international and domestic tax treatment of corporate restructuring, spin-offs, dispositions and acquisitions, financial products and tax controversies. He regularly works with commercial, industrial and financial clients.

He also assists business owners preparing for succession of or exit from their businesses through various alternatives (management buyouts, ESOPs, recapitalizations, and minority or majority sales of the business) by, assisting them in optimizing the structure of the transaction to achieve the desired outcome.

In addition to being a lawyer and a tax strategist, he is a Certified Exit Planning Advisor (CEPA®), a licensed (non-practicing) Certified Public Accountant, a Certified Financial Planner and a FINRA-licensed Series 7, 66 and 69 registered representative.

Mark worked as a law clerk in the U.S. Attorney's office in Lubbock, Texas, and was a National Tax-Product Development Manager for PricewaterhouseCoopers, LLP in Washington, D.C.

### Affiliations

- Texas Bar Association
- American Bar Association
- ESOP Association
- National Center for Employee Ownership

## Education

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

## Bar Admissions

- Pennsylvania
- Texas

## Licenses

- Certified Public Accountant (inactive)
- Certified Financial Planner
- Series 7, 66 and 69 FINRA licenses