

# Snell & Wilmer

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## Mark Powell

Partner | Orange County

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### Main Bio

Mark Powell is a Certified Specialist in Estate Planning, Trust and Probate Law, California Board of Legal Specialization, and a Fellow of the American College of Trust and Estate Counsel. He is a partner in the firm's Private Client Services practice group. Mark focuses his planning practice on three areas: estate and gift tax planning, with a strong emphasis on charitable planning and family philanthropy; family governance and succession planning for clients wanting to provide benefits over multiple generations; and trust and probate administration, including trust and estate litigation.

Mark also mediates trust and estate disputes. Having focused his practice on trust and estate matters for more than 20 years, he has helped resolve a myriad of disputes. Unlike many mediators who focus narrowly on whether evidence will be admissible in court and how it may be interpreted by a judge, Mark believes that the parties to a dispute are in the best position to craft an acceptable resolution because they understand their own reasons for being in the dispute. He helps his mediation clients evaluate the possible outcomes if their matter proceeds to court, but he concentrates on helping them create settlements that address their personal and business interests. Because he maintains an active estate planning practice along side his mediation practice, he is in tune with current issues and strategies.

### Education

- Mercer University Walter F. George School of Law (J.D., 1996)
- University of Georgia (A.B.J., 1990)

### Professional Memberships & Activities

- Southern California Mediation Association
- Orange County Estate Planning Council
- Orange County Bar Association
- Society of Trust and Estate Practitioners
- California Society of CPAs
- Professional Fiduciary Association of California

### Representative Presentations & Publications

- "[Understanding: An Alternative Approach to Mediation](#)," Author, The Daily Journal (November 21,

2019)

- "The Formula General Power of Appointment: Guaranteed Efficiency Between Estate Tax Planning and Income Tax Basis," Co-Author, California Trusts and Estates Quarterly Volume 25, Issue 3 (September 2019)
- "[SCOTUS Rules States Need a Stronger Connection to Tax a Trust by Roger Russell](#)," Quoted, Accounting Today (June 21, 2019)
- "Ethical Considerations," and "Marital Deduction Planning," Contributing Author, CEB California Estate Planning (May 2019)
- "Marital Deduction: Overview and Formula Clauses," "Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts," and "Bypass Trusts and Disclaimer Trusts," Contributing Author, CEB California Will Drafting (August 2018)
- "[Pre-Immigration Planning: Transfer Strategies for Non-U.S. Persons](#)," Co-Author, WealthManagement.com (June 21, 2018)

## Professional Recognition & Awards

- Fellow of the American College of Trust and Estate Counsel (2014-present)
- California Bar Certified Specialist in Estate Planning, Trust & Probate Law
- AV Preeminent<sup>®</sup> Peer Review Rating from Martindale-Hubbell<sup>®</sup> (2007-present)

## Community Involvement

- J.F. Shea Center for Therapeutic Riding (2019-present)
  - Board Member
- Dreams for Schools (2018-present)
  - Board Member
- Laguna Beach High School Scholarship (2013-present)
  - Board Member

## Other Professional Experience

- Dorsey & Whitney, Partner (2017-2019)
- Powell Roberts, Inc., Founder & Managing Partner (2016-2017)
- Albrecht & Barney, Partner (2007-2016)
- Baker Hostetler, Associate (2005)
- Freeman, Freeman & Smiley, Associate (2000-2005)

## Bar Admissions

- California