Mark Jacob

Partner

Houston

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D 713.226.1329

OVERVIEW

Board Certified in Estate Planning and Probate Law, Mark focuses on estate planning, asset protection planning, and income tax planning for individual and corporate clients. He implements sophisticated estate planning and asset protection planning techniques for clients, including family limited partnerships, intentionally defective grantor trusts, charitable remainder trusts, grantor retained annuity trusts, and self-settled spendthrift trusts.

Mark also represents individual and corporate clients on aviation matters, including advising on tax and structuring issues when purchasing an aircraft. He is a frequent speaker and presenter on these topics.

REPRESENTATIVE MATTERS

- Prepare wills, trust agreements, and other estate planning and incapacity planning documents for individual clients.
- Create family limited partnerships and implement more sophisticated estate planning and charitable planning techniques for individual clients, including defective grantor trusts, charitable remainder trusts, and grantor retained annuity trusts.
- Represent clients in probate and estate administration matters, including preparing estate tax returns.
- Advise clients regarding asset protection issues and techniques, including limited partnerships and asset protection trusts.
- Advise clients purchasing and selling airplanes, including structuring transactions to minimize or eliminate sales and use tax and qualify for like-kind exchange treatment.
- Establish charitable organizations, including private foundations, public charities, and supporting organizations, and advise clients regarding the administration of organizations.

AWARDS

- *Best Lawyers in America*®: Trusts and Estates (2013-2027)
- *Super Lawyers*® Texas, Estate Planning & Probate (2008-2011, 2015-2019)
- *Super Lawyers*® Texas Rising Star (2004-2005)
- *Chambers High Net Worth*: Up and Coming: Private Wealth Law, Texas (2023-2026)

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TOP AREAS OF FOCUS

- Private Wealth Management
- Tax

PROFESSIONAL/COMMUNITY INVOLVEMENT

- Member, State Bar of Texas Real Estate, Probate and Trust Law Section
- Member, Houston Estate and Financial Forum
- Former board member
- Member, Generation X Estate Forum Study Group
- Member, Houston Business and Estate Council
- Former advisory board member, National Christian Foundation Houston

EDUCATION AND CERTIFICATIONS

EDUCATION

- The University of Texas School of Law, J.D., *with honors*, 1994
- Westminster College, B.A., *summa cum laude*, 1991

CERTIFICATIONS AND MEMBERSHIPS

- Board Certified in Estate Planning and Probate Law

BAR ADMISSIONS

- Texas

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