Mark W. Roberts

Partner

Seattle
+1.206.370.8119

mark.roberts@klgates.com

OVERVIEW

Mark Roberts counsels and represents individuals and families in both tax and non-tax aspects of estate planning, with an emphasis on personalized needs and advanced tax planning, including use of sophisticated tax strategies to transfer wealth among family members, preservation of assets through use of long-term trusts, partnerships and companies, facilitation of business succession, and preparation of documentation relating to estate planning.

In addressing their estate planning needs, Mark has worked with business owners, founders, executives, artists, authors, professional athletes, multi-generational family groups, and non-U.S. citizens.

Mark assists individuals in developing and implementing charitable giving plans, including private foundations and charitable lead and remainder trusts.

He advises and represents both individual and professional fiduciaries in all facets of the administration of private trusts and decedents' estates, including probate law matters, income and estate tax planning, preparation of required tax returns, and tax audits and appeals before the Internal Revenue Service.

Mark also represents beneficiaries and fiduciaries in will and trust disputes, including will and trust interpretations, breach of fiduciary duty claims, will contests, accounting proceedings, and charitable trust reformations.

Mark regularly presents at professional education programs on topics related to estate planning and probate law.

ACHIEVEMENTS

Mark is consistently recognized for his work in the trusts and estates area by leading industry publications and evaluators, including the following:

- Listed in the *Best Lawyers in America*® for Trusts & Estates (since 2001)
- Recognized by *Chambers USA* with a Tier 1 ranking for Private Wealth Law in Washington (since 2018)
- Named to Washington Super Lawyers list for Estate Planning & Probate (since 2000)
- United States Lawyers Rankings, Nation's Top 10 Lawyers, #1 Trusts & Estates (since 2015)

PROFESSIONAL / CIVIC ACTIVITIES

- Washington State Bar Association
  - Past chairperson, Real Property, Probate and Trust Section; served on its Executive Committee for eight years
  - Co-Chair, Probate Law Task Force, a committee that drafted comprehensive legislation revising Washington's probate laws recently enacted by legislature
  - Member, Directed Trust Committee, a committee that drafted legislation revising Washington's trust laws enacted by the legislature in 2015
  - Member, Tax Section Estate and Gift Tax Committee
- Fellow of the American College of Trusts and Estates Counsel
- Seattle Estate Planning Council; past member of Executive Committee

EDUCATION

- J.D., University of North Carolina at Chapel Hill School of Law, 1981 *with honors*
- B.A., Bucknell University, 1978 *magna cum laude*

ADMISSIONS

- Bar of Washington

THOUGHT LEADERSHIP *POWERED BY HUB*

- 3 January 2024, Tax and Estate Planning Opportunities to Consider Now
- 5 June 2023, New Washington Capital Gains Tax Impacts Estate Planning
- 21 November 2022, Year-End Estate Planning Update
- 2 April 2021, Proposed Federal Estate and Gift Tax Legislation
- 4 January 2018, Changes to Federal Estate, Gift, and Generation-Skipping Transfer Tax Laws
- 4 April 2017, New Washington Law Regarding Durable Powers of Attorney Provides for Significant Changes to Previous Law
- 12 August 2016, IRS Plans to Disallow Minority Interest Discounts for Family-Controlled Entities; Action May Be Required Before Year-End

NEWS & EVENTS

- 18 August 2022, More Than 350 K&L Gates Lawyers Named Among 2023 Best Lawyers in America, Ones to Watch
- 19 August 2021, Nearly 300 K&L Gates Lawyers Named Among 2022 Best Lawyers in America, Ones to Watch

AREAS OF FOCUS

- Tax
- Estate Planning and Trusts & Estates
- Nonprofit Organizations