Resume

BAKER TILLY

Candor. Insight. Results.

Markalan T. Smith, CPA, MST
Partner

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Mark Smith, Partner with Baker Tilly Virchow Krause, LLP with the Financial Planning and Estate Group, has been with the firm since 1996. He specializes in estate, gift, and retirement planning as well as charitable gift planning. Mark is experienced in income tax planning, trust and estate administration, and business succession planning.

Specific Experience

- Develops wealth transfer techniques including FLPs, GRATs, CRUTs, QPRTs, ILITs, and IDGTs.
- Coordinates implementation of wealth transfer techniques with other client professional advisors.
- Establishes retirement distribution plans.
- Provides consultation on charitable deferred giving techniques including gift annuities, private foundations, and public foundations.
- Implements financial planning models for clients such as cash flow planning and insurance planning.
- Consults on succession and retirement planning.
- Specializes in post death estate planning and prepared estate tax returns.
- Provides tax planning for individuals, trusts, partnerships, and exempt organizations.

Industry Involvement

- American Institute of Certified Public Accountants
- Wisconsin Institute of Certified Public Accountants
- National Association of Philanthropic Planners
- Mark has conducted seminars and continuing education classes on a wide range of estate tax planning and retirement topics. He has authored articles on succession planning and charitable remainder trusts.

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Education

University of Kentucky
Bachelor of Arts in Political Science
Masters in Accounting and Tax