

# Griffin Financial Group

A STEVENS & LEE COMPANY



## Mark B. Russell

Head, ESOP Group

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## Areas of Focus

### Services

ESOPs - Employee Stock Ownership Plans

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Mark Russell works with investment banking clients and their principals providing merger and acquisition advisory services; and private placements of debt and capital. Mark works extensively with business owners, evaluating their business and personal situations and assisting them in preparing for succession of or exit from their businesses. To accomplish this, he takes business owners through a process designed to help them identify their goals and objectives, then performs an exhaustive analysis of various alternatives (including management buyouts, ESOPs, recapitalizations, and minority or majority sales of the business) to ensure business owners have all of the information necessary to decide the best path to achieve their goals. Finally, he assists business owners in optimizing the strategies designed to achieve the desired outcome.

As a Certified Exit Planning Advisor (CEPA®), a Certified Financial Planner (CFP), non-practicing CPA and a lawyer, Mark's background provides an important link between clients and their accountants and lawyers to creatively address accounting, tax and financial planning issues.

Prior to joining Griffin, Mark served as a National Tax-Product Development Manager for PricewaterhouseCoopers, LLP in Washington, D.C., where he was responsible for conceiving creative corporate tax planning strategies and analyzing publicly available information to determine the applicability of those strategies. He was also responsible for implementing large projects and coordinating project teams and corporate personnel.

Mark is a member of The ESOP Association's Finance Committee, the National Center for Employee Ownership and is an Organizational Board Member and Treasurer of the Texas 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, B.B.A., Accounting

## Licensing

- Certified Financial Planner (CFP)
- FINRA Series 79, 7 and 66 licenses