Sarah Marks

Partner

Dallas

Sarah.Marks@haynesboone.com

+1 214.651.5209

PRACTICES Tax, Family Wealth and Estate Planning, Trust and Estate Administration, Private Clients and Estate Planning

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Sarah Marks advises high-net-worth individuals and families on sophisticated estate and tax planning strategies. Her practice centers on estate, gift, and generation-skipping transfer (GST) tax planning, and she regularly drafts wills, revocable trusts, and other essential estate planning instruments tailored to client objectives.

Sarah works extensively with high-net-worth families to design and implement complex wealth preservation and transfer structures. She assists clients in achieving long-term goals such as succession planning, philanthropic initiatives, and family governance. Her experience includes creating dynastic trusts, grantor retained annuity trusts, charitable trusts, and other advanced planning vehicles to ensure efficient wealth transfer aligned with each client’s legacy.

In addition to traditional estate planning, Sarah provides strategic guidance for clients anticipating major liquidity events, such as business sales. She develops pre-transaction planning strategies that maximize tax efficiency and facilitate wealth transfers to future generations. Her work also encompasses advising individual and corporate fiduciaries on estate and trust administration, helping them establish sound procedures to minimize risk and avoid litigation.

Sarah further counsels families on governance agreements to mitigate risks associated with disruptive events and assists in structuring family offices to centralize asset management and optimize investment opportunities. She collaborates with family office general counsels and investment advisors to create entities and policies that address complex family needs. Additionally, she advises on prenuptial and postnuptial agreements, focusing on asset protection and community property considerations.

Sarah is Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization.

QUALIFICATIONS

EDUCATION

- J.D., Harvard Law School
- Economics and English, University of Florida, cum laude

ADMISSIONS

- Texas

PUBLICATIONS AND SPEAKING ENGAGEMENTS

Publications

- House Ways and Means Committee Tax Plan Proposes Changes to Estate Planning, *Holland & Knight Alert*, September 29, 2021
- Unique Estate Planning Opportunities Amid COVID-19, *Client Alert*, April 10, 2020
- Estate Planning Dos and Don’ts During a Lockdown, *Client Alert*, March 25, 2020
- Overview of QSSTs and ESBTs, *Thompson & Knight Presentation*, March 26, 2015

Speaking Engagements

- Texas Tax Section Annual Meeting and CLE Program Leadership Academy, State Bar of Texas Tax Section, June 17, 2022
- Tax Law in a Day, State Bar of Texas Tax Section, February 3 - 4, 2022

PROFESSIONAL AFFILIATIONS AND ENGAGEMENTS

- The Family Place, Board of Directors, 2023-Present
- State Bar of Texas
- State Bar of Texas, Tax Section, Estate and Gift Tax Committee Vice Chair

AWARDS AND RECOGNITIONS

- *Chambers High Net Worth* guide, Private Wealth Law: Texas, 2024
- Ones to Watch, *The Best Lawyers in America* guide, Dallas Trusts and Estates, 2021-2023