



MARK MALONE
SHAREHOLDER

(405) 552-2274 **DIRECT**
(405) 228-7474 **FAX**
mark.malone@mcafeetaft.com

McAFEE & TAFT
Leaders in Creating Legal Solutions®

TENTH FLOOR
TWO LEADERSHIP SQUARE
211 N. ROBINSON
OKLAHOMA CITY, OKLAHOMA 73102
www.mcafeetaft.com

BIOGRAPHY

Mark Malone assists clients in all aspects of estate planning, administration of estates, settlement of complex estate matters, and settlement and litigation of disputes regarding wills and trusts. He goes beyond the minimization or elimination of taxes to ensure that the estate plans are flexible and adaptable so they can provide for and respond to circumstances that could not be foreseen, shifting investment climates and ever-changing laws and family situations.

Mark works with other McAfee & Taft lawyers to draw upon substantial experience in the laws of income, gift, estate and generation-skipping taxation, partnerships, corporations and other business entities, securities, pension and retirement benefits, intellectual property, real estate and other relevant areas to design and implement comprehensive estate plans that are crafted to fit the clients' particular circumstances and objectives. In addition, he works cooperatively with client's other advisors, such as private bankers and trust officers, financial planners, investment advisors, family office managers, accountants, insurance agents, business appraisers and other lawyers to ensure that the client's estate plan is coordinated with their financial structure.

Mark has experience in resolving disputes over the interpretation, administration and management of trusts and estates. He prosecutes and defends challenges to wills and trusts and handles litigation necessary to reform or clarify trust instruments. Mark represents a wide range of individuals, businesses and institutions in connection with probate and fiduciary litigation, including settlers, donors, personal representatives, beneficiaries, trustees, guardians and other fiduciaries. In addition, he is sensitive to family relationships and has experience in resolving disputes outside the courtroom.

Mark's achievements have earned him inclusion in *The Best Lawyers in America* (trusts and estates litigation).

Prior to joining McAfee & Taft in 2002, Mark was a police officer with the Fort Worth, Texas, Police Department.

REPRESENTATIVE EXPERIENCE

- Represents families and individuals in the United States regarding the preservation, management and transfer of wealth.
- Structuring and preparing wills and trusts, including charitable remainder and lead trusts, trusts designed to hold life insurance, and generation-skipping trusts.
- Advising fiduciaries and beneficiaries of estates and trusts and negotiating settlements of family disputes.
- Negotiating and organizing the corporate structure for a variety of business entities.

- Secure trustee appointments and resignations.
- Clarify trustee's powers and duties.
- Divide trust assets into separate trusts for different beneficiaries.
- Resolve ambiguous or inconsistent trust language.
- Successfully represented an elderly individual in district court in the adoption of collateral adult relatives in order to save significant Oklahoma estate taxes at the time of her death.
- Intervened in guardianship proceedings on behalf of one of the prospective ward's children to ensure that petitioning sibling properly accounted for all assets in the guardianship estate.
- Handled the joint ancillary probate of four estates, two of which were governed by the laws of intestacy and two of which were governed by a last will and testament, to pass title to Oklahoma mineral interests.
- Frequently represents large out-of-state banks with probate matters, including the preparation of federal and Oklahoma estate tax returns.
- Assisted the adult child of an elderly individual in the investigation of potential physical abuse and financial exploitation of the elderly individual by a live-in caregiver. After gathering evidence of the elderly parent's potential incapacity, and following the discovery of the extent to which the live-in caregiver had exploited the elderly's parent's financial resources, McAfee & Taft assisted the adult child with emergency guardianship proceedings for the elderly parent. McAfee & Taft also assisted the adult child in all dealings with local law enforcement agencies, to include the Oklahoma County District Attorney's Office, in the criminal investigation of the live-in caregiver.

ADMISSIONS

- Oklahoma, 2002

EDUCATION

- J.D., *magna cum laude*, Oklahoma City University, 2002; Phi Delta Phi; Merit Scholar; *Oklahoma City University Law Review*; Faculty Honor Roll; *Who's Who: American Law Students*
- B.S., Texas Christian University, 1990

PROFESSIONAL ORGANIZATIONS AND MEMBERSHIPS

- Oklahoma County Bar Association
- Oklahoma Bar Association

CIVIC INVOLVEMENT AND LEADERSHIP

- Oklahoma Academy for State Goals (Current Academy Member and Former Member of the Board of Directors)
- University of Central Oklahoma / U.S. Olympic Committee Community Partner Council