



Mark is responsible for tax compliance services to business and individuals, with specialized knowledge related to international/cross-border taxation as well as state and local tax (SALT), including state nexus and taxation analysis, M&A due diligence, and various related compliance for companies of all sizes. Mark joined the firm in 2013; he was named partner in 2024.

### EDUCATION

St. John Fisher University, Master of Business Administration, Accounting  
St. John Fisher University, Bachelor of Science, Accounting

### PROFESSIONAL

American Institute of Certified Public Accountants  
New York State Society of Certified Public Accountants  
Passed Series 7 and 66 securities exams – Financial Advisor\*  
Transformational Leadership Program™ 2024, Convergence Coaching®

### COMMUNITY

Lumsden McCormick Making A Difference (MAD) Committee, Member  
Dog Ears Bookstore and Cafe, Former Treasurer

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