Jason E. Marx

Partner

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Overview

Jason E. Marx is a Partner at Mandelbaum Barrett PC, and a member of the firm's Tax, Trusts, and Estates Practice Groups. His practice focuses on estate planning, estate administration, elder law, wills and trusts, tax and business planning for individuals, corporations, partnerships and limited liability companies, and tax controversies.

Mr. Marx serves as a strategic advisor to high net worth and ultra-high net worth individuals, families, executives, business owners, executors and trustees. He counsels clients on a wide range of issues in the areas of taxation, trust and estate law. His work encompasses the structuring of wealth preservation and asset protection strategies and the preparation of estate planning documents such as wills, living wills, powers of attorney, trust agreements, special needs trusts and domestic and offshore asset protection trusts. Mr. Marx advises executors and trustees on the practical and successful administration of estates and trusts, including the minimization of trust and estate tax liability and the oversight of probate and the estate/trust administration process. He assists clients with the formation of various business entities, including corporations and limited liability companies, and the preparation of buy-sell agreements, the orderly succession of business interests, the structuring of business mergers, acquisitions and sales, and the preparation of federal and state gift tax returns, estate tax returns and inheritance tax returns. He represents clients in tax controversy matters before the Internal Revenue Service and state taxation agencies.

Mr. Marx also has significant experience in elder law where he guides clients through the challenges associated with planning for long term care needs, guardianships, and eligibility for Medicaid and related public assistance and government benefit programs.

Mr. Marx frequently lectures and writes about estate and assets protection planning, elder law and Medicaid planning and business succession planning.

Jason earned his LL.M. in Taxation from New York University School of Law, his J.D. with a concentration in Taxation and Health Law from Seton Hall University School of Law, and his B.S.B.A. in Finance from Boston University School of Management.

Publications

Marx, Jason. "You, Your Legacy, and Your Practice's Future" Today's Veterinary Business, October/November 2025.

Marx, Jason. "Navigating the Future: Succession Planning for Auto Repair Shop Owners" Thomas Greco Publishing, November 2024.

Marx, Jason. "Estate Planning Challenges for Same-Sex Couples." Issues and Ideas with Chris DeBello. 106.3 WHCY-FM, 25 June 2023.

Areas of Practice

Elder Law

Special Needs

Tax Law

Trusts and Estates

Corporate

Admission

New Jersey

New York

Federal District of New Jersey

United States Tax Court

Education

New York University School of Law, LLM, *Taxation*, 2003

Seton Hall University School of Law, J.D., *Concentration in Taxation and Health Law*, 1998

Boston University, BSBA, Finance, 1990 *(Zeta Beta Tau Fraternity, Golden Key National Honor Society)*

Speaking Engagements

New Jersey Society of CPAs (NJCPA) Webinar: *"Gift Tax Returns & Valuation Tips for CPAs",* May 13, 2025.

Hot Topics in Elder Law Speaker Series: *"Myths and Misconceptions in Estate and Medicaid Planning,"* March 8, 2023.

Hot Topics in Elder Law Speaker Series: "*Legacies Instead of Litigation – Tips to Stay Out of Court for the Aging Population,"* April 18, 2023.