

Jason E. Marx

Partner, Chair of the Taxation and Estate Planning Group,
Chairman of the Elder Care and Special Needs Planning Group

(973) 852-3229



Practice Area

- Taxation and Estate Planning
- Elder Care and Special Needs Planning

Bar Admission

- New Jersey, 1998
- New York, 2001
- U.S. District Court District of New Jersey, 1998

Education

- **New York University School of Law**, New York, New York
 - LL.M. (in Taxation) - 2003
- **Seton Hall University School of Law**, Newark, New Jersey
 - J.D. - 1998
- **Boston University Questrom School of Business**
 - B.S.B.A. - 1990
 - Major: Finance

Professional Association

- National Academy of Elder Law Attorneys
- Academy of Special Needs Planners
- New Jersey State Bar Association
- New York State Bar Association
- Essex County Bar Association

Volunteer Activities

- Board of Trustees, The Jewish Community Housing Corporation



Jason is a Partner and Chair of the Taxation and Estate Planning Group and the Elder Care and Special Needs Planning Group at Curcio Mirzaian Sirot LLC. He dedicates his practice to making a positive impact and serving his clients in the areas of tax and estate planning, elder law, life care planning, asset and wealth preservation planning and special needs planning.

Jason's taxation and estate planning practice focuses on estate planning, estate administration, wills and trusts, tax and business planning for individuals, corporations, partnerships and limited liability companies, and tax controversies. Jason serves as a strategic advisor to individuals, families, business owners, executors and trustees, counseling clients on a comprehensive range of issues within the areas of tax, trust and estate law. He designs and implements wealth preservation strategies and prepares a variety of estate planning documents such as wills, living wills, powers of attorney, trust agreements and special needs trusts. Jason counsels executors and trustees on the practical and successful administration of estates and trusts, including the minimization of income and estate tax liability and oversees the will probate process. He assists clients with the formation of corporations, limited liability companies and other business entities, the preparation of buy-sell agreements, the orderly transfer of business interests from one generation to another, the structuring of real estate transactions and the preparation of federal and state estate and inheritance tax returns. He represents clients in tax controversy matters before the Internal Revenue Service and the New Jersey Department of Taxation.

As an elder care and special needs attorney, Jason is committed to protecting and advocating for the legal rights of the elderly and the disabled to ensure that the unique needs of these individuals and their families are met. Through his holistic approach, Jason guides clients through the challenges associated with aging in place, planning for nursing home or other long-term care needs, guardianship issues, and the facilitation of a client's eligibility for Medicaid and related government programs and benefits.

In addition to his practice, Jason lectures extensively on elder care, estate planning, asset protection, special needs planning and related matters.

Jason is a member of the National Academy of Elder Law Attorneys. He is also a member of the Board of Trustees and treasurer of the New Jersey Chapter of the National Academy of Elder Law Attorneys, and he serves as a member of the Board of Trustees and Chair of the legal committee of the Jewish Community Housing Corporation.

[The Super Lawyers lists are issued by Thomson Reuters. A description of the selection methodology for both lists may be found at www.superlawyers.com/about/selection_process_detail.html. No aspect of this advertisement has been approved by the Supreme Court of New Jersey].

Classes & Seminars

- Presenter, Business for Breakfast Program: "Protecting Employees and Employers During Critical Times," Connell Foley Program (September 2019)
- Speaker, "Uniform Trust Code," New Jersey State Bar Association/NJICLE 18th Annual
- Presenter, "Changes to Overtime White Collar Exemptions and Time-Limited Non-Enforcement Policy," New Jersey Association of Community Providers (June 2016)
- Speaker, "Uniform Trust Code; other topics covered included social security, estate planning in the digital age, federal nursing home reform, legislative updates and others," New Jersey State Bar Association's 18th Annual Elder & Disability Law Retreat, Hamburg, NJ (April 2016)
- Speaker, "Administration of a Special Needs Trust," Rules of Trust Administration Seminar (Lorman Education Services, Fairfield, NJ) (October 2014)
- "Medicaid Eligibility and Estate Recovery: Estate Planning Techniques," Lorman National Webinar (December 2013)
- "Medicaid Eligibility" presented to the Livingston Old Guard, Livingston, NJ (May 2013)
- "Protecting Your Assets: An Elder Law Update" presented to AARP Chapter, Dumont, MI (October 2012)
- "Staying Golden in Your Golden Years" presented to the Paramus Seniors Group (October 2012) Jason E. Marx WWW.CONNELLFOLEY.COM ROSELAND JERSEY CITY NEWARK NEW YORK CHERRY HILL PHILADELPHIA
- "Estate Planning and Protecting Your Assets" presented to the Pompton Lakes Seniors Group (October 2012)
- "Protecting Your Assets" presented to the Nutley Seniors Service Club (October 2012)
- Estate planning seminar presented to the Montclair Rotary Club (July 2012)
- "Planning with Life Insurance," NJ Institute of Continuing Legal Education, NJ Law Center (December 2011)