Trusts and Estates

Our Valuation & Advisory (V&A) Trusts & Estates group is a premier provider of valuation services to law firms, accounting firms, financial planners, and their clients for estate and gift tax purposes.

Newmark offers a comprehensive approach to valuation, providing a one-stop solution for trust and estate clients through our interdisciplinary expertise. Our business valuation specialists work alongside a nationwide network of state-licensed real estate appraisers to assist attorneys, accountants, and financial planners in estate and gift tax matters as well as succession planning.

Our team of professionals specializes in appraising closely held businesses and commercial real estate for a diverse array of stakeholders, including minority and majority shareholders, federal and state regulatory agencies, and REITs. We have a proven track record of defending our valuation opinions against tax authority challenges and offering litigation support when needed. Our experts have been engaged in numerous cases across the country and have been featured as speakers at various industry events and conferences.

In addition, Newmark is uniquely positioned to value trust and estate portfolios. We have more than 650 professionals nationwide with real estate, business entity, and personal property valuation capabilities. Our expansive reach allows us to serve clients worldwide and communication is streamlined with a single point of contact leading each assignment. This allows us to better serve attorneys who have clients with diverse assets in multiple geographic locations and provides simplified communication and coordination in the event of an IRS audit.

The Trusts & Estates group's primary services include real property, business, and personal property valuations for:

- **Estate & Gift Tax Purposes**
- **Basis Planning**
- **Trust Disputes**
- **Succession Planning**
- **Owner Buyout Purposes**
- **Partial or Fractional Interest Valuations**

ABOUT NEWMARK

We transform untapped potential into limitless opportunity.

At Newmark, we don't just adapt to what our partners need—we adapt to what the future demands. Our integrated platform delivers seamlessly connected services tailored to every type of client, from owners to occupiers, investors to founders, and growing startups to leading companies. We think outside of boxes, buildings and business lines, delivering a global perspective and a nimble approach. From reimagining spaces to engineering solutions, we have the vision to see what's next and the tenacity to get there first.

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