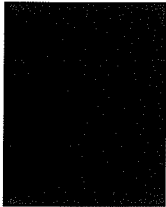


M A R I L Y N J . G A G E N , C P A L L C



Marilyn J. Gagen, CPA

With 44 years of experience in public accounting, Marilyn worked in the audit and middle market services departments of Deloitte & Touche LLP for four years before transferring to tax in the Deloitte Cleveland Office. Marilyn became a partner of Deloitte in June 1981. She transferred to Phoenix in 1985 to become the partner-in-charge of the Deloitte Phoenix tax practice, and transferred to Honolulu in 1991 to become partner-in-charge of the Deloitte Hawaii tax practice. In May 2002 Marilyn retired from Deloitte, and now serves several long-time clients. At the time Marilyn was promoted to partner at Deloitte she was one of only 6 women partners out of 1,500 US partners. At her retirement in 2002 she was the most senior woman partner with Deloitte.

Marilyn specializes in income tax planning, estate tax planning, charitable giving, and financial consulting services to high net worth individuals and their closely held businesses, trusts, estates, private foundations, charitable remainder trusts, family partnerships and family offices.

Marilyn's professional and community activities include:

American Heart Association – Former Hawaii board member; Past chair of Pacific Mountain Affiliate (“PMA”), including 10 Western States; PMA Finance and Corporate Operations committee member; chairman of the state advocacy committee; member of the Western State's Affiliate advocacy committee; former Oahu metro-board member; former development director of the statewide board; former major gifts chair; former chair of the statewide board, former chair of the Oahu Division board, former development director of the Oahu Division board. Currently serving as chair of the Hawaii advocacy committee.

Coalition for a Tobacco Free Hawaii – Former Board member; former treasurer; former chair; former development committee chair; former policy committee chair. Currently serving on the finance committee.

Former member of the Governor’s appointed **Tax Review Commission**

American Institute of Certified Public Accountants - Member

Hawaii Society of Certified Public Accountants - Member

Honolulu Estate Planning Council - Former Board member and former vice president

Financial Planning Association of Hawaii – Former board member, former chair; former president; former treasurer; former program chair

Marilyn graduated Magna Cum Laude with a BS in Accounting from Case Western Reserve University, Cleveland, Ohio. She enjoys walking her rescue dog Captain Morgan, reading, scuba diving, yoga and touring on motorcycles.

