

# Marla Esan

## TAX & BUSINESS SERVICES

Marla Esan is a Director in the Family Wealth Services group of the Firm's Long Island office. She has more than 20 years experience with a particular expertise with high-net-worth individuals and fiduciary taxation. Her in-depth background with tax compliance compliments her ability to maximize tax saving strategic solutions.

Ms. Esan has developed a strong passion for working closely with nonprofit clients. In 2007, she championed the idea of starting Marcum's Nonprofit Tax Compliance area with the 20 existing private foundation clients. She quickly grew the Melville office client base to 150 nonprofit organizations while providing consultative services and oversight to more than 250 private foundations and public charities throughout the New York region. Ms Esan developed and created the Firm's Nonprofit Back Office Business; a multi-faceted customized operations solution for bookkeeping, grants administration, hands-on-training, reporting and compliance needs. This allows more time for nonprofits to spend on societal impact and less on management and operations.

Ms. Esan's specialty is educating, training and engaging donors in philanthropy by advising them from vision to mission to development and finally execution. She advises nonprofit management with operations, and fiduciary and compliance responsibilities. Her knowledge of working with high-net-worth individuals uniquely qualifies her to strategically maximize donors' philanthropic goals.

Ms. Esan joined the Firm in 1999 as a Supervisor and has been given increasing levels of responsibility; being named Manager in 2004 and Senior Tax Manager in 2006. Prior to joining Marcum, Ms. Esan operated her own accounting firm. For more than 12 years she focused on individual, fiduciary and non-profit taxation.

### Professional & Civic Affiliations

New York State Society of Certified Public Accountants (NYSSCPA)  
National Association of Female Executives  
Metro New York Philanthropic Advisors Network (NYPAN)  
GuideStar, Advisory Panel  
Nonprofit Coordinating Committee of New York (NPCC)  
Nonprofit Professionals Forum

### Articles, Seminars & Presentations

Advanced Wealth Strategies, Registered Rep, August 2011  
Demystifying Private Foundations, CPE Seminar, 2011  
Nonprofits Out There – Beware of May 15, 2010, Marcum Insights & Alerts  
The Rewards of Giving: A Look Into Private Foundations,  
Family Foundation Advisor, March/April 2009  
Private Foundations Tax Compliance, CPE Seminar, NYSSCPA,  
Nassau County Chapter, 2008

### Awards & Recognitions

Who's Who in Women in Professional Services, Long Island Business News, 2011



**Marla Esan**  
Director

### AREAS OF EXPERTISE

Non-Profit Taxation & Compliance  
Individual Income Tax  
Fiduciary Taxation  
Nonprofit Consulting

### KEY CLIENTS

Private Foundations  
Public Charities  
High-Net-Worth Individuals

### EDUCATION

Bachelor of Business Administration,  
Accounting  
City University at Queens College  
(CUNY)

Bachelor of Business Administration,  
Economics  
City University at Queens College  
(CUNY)



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