

**Stew Martin**

Senior Investment Consultant



Stew is a Senior Investment Consultant at Orion Advisor Services, bringing 24 years of experience in investment management to his role. At Orion, Stew plays a pivotal role in educating clients about the benefits of Custom Indexing, helping them understand how this innovative approach can enhance their investment portfolios and achieve their financial objectives.

Before joining Orion, Stew gained invaluable experience at Active Index Advisors/Natixis, where he specialized in Direct Indexing and tax-efficient portfolio construction. His expertise in these areas allowed him to develop and implement strategies that enhance investment performance while minimizing tax liabilities.

Stew holds a BA in Political Science from the University of Kansas and is certified with the Series 24, 7, and 63 licenses, reflecting his commitment to maintaining the highest standards of professional excellence.

Outside of his professional work, Stew enjoys backpacking, sailing, and spending time with his family. These activities provide him with a well-rounded perspective and enrich his approach to investment consulting.

For more information or to connect with Stew, please visit, www.linkedin.com/in/stewart-martin.

