

Steven S. Martin, CPA, CFP®

Senior Vice President, Investments



Steve has more than 25 years of experience in the financial industry and an additional 10 years of experience in the accounting field. As a CERTIFIED FINANCIAL PLANNER® professional, Steve believes that comprehensive financial planning is the best way to insure that your investment plan supports your financial and life goals. He is Series 7 and 66 registered with FINRA and is licensed to sell long-term care and life insurance.

Steve holds a BS degree in Accounting from Frostburg State University and an MBA from Mount Saint Mary's University (both in Maryland). Although he no longer acts in this capacity, he holds the Certified Public Accountant (CPA) certificate. Invested in his community, Steve serves on the board of Virginia United Methodist Pensions, Inc. In his free time, he enjoys playing tennis, golf, running and traveling with his wife, Daphne.