



F. Stewart & Associates P.C.
WEALTH MANAGERS

Biographies

Fred J. Stewart, Ph.D., CFP® Senior Financial Planner



Fred J. Stewart is the owner of F. Stewart & Associates, P.C. He earned a Bachelor of Science degree in Wildlife Biology, with Honors, from the University of Montana in 1967. Following two years with the Peace Corps and one year teaching in Kansas City, he entered graduate school. He received a Ph.D. in Agricultural Economics from the University of Kentucky in 1975. He worked as a Research Economist for 3 years in Florida and as a Forest Service Economist in Missoula for 25 years, prior to his retirement in September of 2003. In 1988, Dr. Stewart completed a two-year course of study from the College of Financial Planning in Denver, Colorado. The certification of CERTIFIED FINANCIAL PLANNER™ was conferred by the International Board of Standards and Practices for Certified

Financial Planners (IBCFP) in 1988. His 20 years of experience as a fee-only financial planner have focused primarily on integrated planning and investment advice for individuals and families in Montana, although he has clients throughout the U.S. and overseas. Dr. Stewart & his firm have been registered as an investment adviser with the State of Montana since 1989.

Jill M. Tripp, B.S., CFP® Associate Financial Planner

Jill M. Tripp graduated from the University of Montana with Highest Honors in 1999. Ms. Tripp has a Bachelor of Science degree in Business Administration with a double-emphasis in Finance and Accounting and a minor in Spanish. She was selected for the President's Recognition Award as the Outstanding Senior in Finance during the 1999 academic year. After graduation, Ms. Tripp spent three years working as Credit Analyst for the commercial loan department of a local bank. Since 2002, she has been employed by F. Stewart & Associates, P.C. She completed her courses with the College for Financial Planning in 2005 and passed the CFP Board Certification Exam in 2006. Ms. Tripp is also registered with the State of Montana as an investment advisor representative.



Richard C. Marshall, Ph.D.
Associate Financial Planner



Richard C. Marshall graduated from Michigan Technological University in 1971 with a Bachelor of Science degree in Business Administration. Before entering graduate school, Dr. Marshall played semi-professional hockey, and he also worked as an Economic Planner for an American Indian tribal organization, as a Management Trainee for a bank, and as a Claims Representative for the Social Security Administration. He received an M.A. in Economics from Wayne State University in 1976. For the next two years, he worked as an Economist for the State of Michigan, and from 1978-1980 he was employed as an Economist by the U.S. Department of Housing and Urban Development. Dr. Marshall joined the U.S. Forest Service in 1980 and held the position of Mineral Economist for Region 1 of the U.S. Forest Service for over 20 years until his retirement in 2005. In the mid-1980s, he returned to graduate school and earned a Ph.D. in Mineral Economics from the University of Arizona. He enrolled in the College for Financial Planning in August 1999 and completed his coursework in 2004. He passed the CFP Board Certification Exam in 2006. For four years, Dr. Marshall provided independent consulting services to F. Stewart & Associates, P.C., on such projects as summarizing developments in the equity markets and analyzing the preparedness of mutual fund companies to deal with potential Year 2000 (Y2K) problems. He now works as an associate with F. Stewart & Associates and is registered with the State of Montana as an investment adviser representative.

Linda K. Benton
Office Manager

Linda K. Benton had a 39-year career with the U.S. Forest Service where she worked in a variety of positions. She also spent 2 years as a Personnel Assistant with the Department of the Army at Fort Bragg, North Carolina. Linda retired from the Forest Service as the Information Technology Specialist for the Lolo and Bitterroot National Forests. She joined F. Stewart & Associates as their Office Manager in 2005.

