



Triangle Community Foundation Investment Committee

Investment Advisors

Jim Russo, CFA, Managing Director and Partner, serves as the primary consultant for 18 of our clients and is responsible for conducting manager research and asset-class modeling. Jim has 32 years of investment experience in the financial-services industry. Prior to joining Crewcial Partners, he worked as a buy-side equity analyst and portfolio manager at Dreyfus, J.P. Morgan, and AllianceBernstein. In addition, he spent three years at the J.P. Morgan Private Bank as the Director of US Research on Third-Party Managers. Jim is a CFA charter holder and received his BBA in Banking and Finance from Hofstra University and his MBA from New York University.

Regina Cho, Investment Director, has been with Crewcial Partners since May 2011 and has over ten years of investment experience. Regina has a key role in sourcing investment manager recommendations globally across asset classes, including public equities, credit, and private equity, and conducting on-going due diligence with a focus on hedge funds. She also plays a significant role in Crewcial's diversity initiative. Prior to joining Crewcial, Regina was a Senior Research Analyst for Deerfield Partner's internal research firm and a Research Analyst for Gerson Lehrman Group focused on primary research. Regina has a BA in Biology from George Washington University.

Committee Chair

Sheldon Fox, Chief Operating Officer of KDI Capital Partners, LLC. Sheldon is the portfolio manager for KDI's Value Preservation Strategy, a hedged strategy that the firm began offering to investors in 2009. Sheldon joined KDI in 2004, after serving almost five years as chief financial officer of two bank holding companies, CCB Financial Corporation and its successor by merger National Commerce Financial. Sheldon is a CPA and spent the first sixteen years of his professional career with KPMG, LLP in Raleigh. He specialized in serving companies in the financial services industry and was admitted to the firm's partnership as a tax partner in 1993. Sheldon also serves on many other boards and committees.

Committee Members

Mark Kuhn, President Kuhn & Associates. Mark served in a number of positions within Duke University for over 20 years, including as Director of Public Securities at Duke Management Company. In 1993, Mark started Kuhn & Associates, an investment advisory firm. Mark is a North Carolina CPA; he currently serves on Triangle Community Foundation's Board of Directors and chairs Investment Committee. He currently volunteers on boards and committees for other organizations.

Wayne Morgan, Chief Investment Officer, Novant Asset Management. Wayne founded Tanglewood Asset Management and served as president from 2002 to 2007; was Senior Vice President and Head of Fixed Income for Wachovia Asset Management from 1997 to 2002, and was Director of Investments for UNC-Chapel Hill from 1984 to 1997. In 2007, Wayne became Chief Investment Officer of Novant Asset Management, a registered investment adviser that manages the investment assets of Novant Healthcare. Wayne is a Chartered Financial Analyst and serves on many other boards and committees.

Angela Moss, Director of Public Investments, UNC Management Company. Angela joined UNC Management Company in 2006 and is currently the Director of Public Investments. Prior to joining UNCMC, Angela was a Co-Portfolio Manager and Research Analyst for Hale and Dorr Wealth Advisors in Boston, MA. Before Hale and Dorr, she worked in investment banking at Bank of America Securities, and at Leerink Swann & Co., where she assisted in origination, structuring and execution of corporate finance transactions and advisory services, including mergers and acquisitions, restructurings, and equity

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offerings. She began her career in Boston at Pricewaterhouse Coopers as a consultant to investment firms. She is currently the Chair of the East Carolina University Alumni Association Board and its Investment Committee.

Edwin Poston, Managing Partner, TrueBridge Capital Partners. Edwin is co-founder and Managing Partner of TrueBridge Capital Partners. Prior to TrueBridge, he was one of two managing directors at The Rockefeller Foundation in New York, where he served as the head of private equity. While involved across the entire portfolio, he was particularly focused on private assets including building and managing the foundation's venture capital and buyout portfolios, both domestically and internationally. Currently, Edwin serves on the finance committee for the Board of Directors of the College of Arts and Sciences at UNC-Chapel Hill.

Scott Schoedler, Vice President of Finance, Burroughs Wellcome Fund. Scott came to the Burroughs Wellcome Fund from the Rockefeller Foundation in New York, where he was Senior Asset Manager, Marketable Securities for the Foundation's \$2.2 billion endowment. His prior financial experiences include Unisys Corporation and NCR Corporation. Scott is currently Vice President of Finance of Burroughs Wellcome Fund, a private foundation established to advance the medical sciences by supporting research and other scientific and educational activities. Scott also serves on many other boards and committees.

Staff Members

Lindsay Harrell, Controller, is responsible for the operation and safeguarding of the Foundation's accounting records. Prior to joining the Foundation, Lindsay was a Senior Accountant at Cherokee Investment Partners for the private equity funds.

Robert Naylor, Chief Financial Officer and Director of Administration, is responsible for the investing, budgeting, auditing, and reporting functions of the Foundation. Robert brings with him over 20 years of experience in national and international financial, accounting, and administrative operations in the United States, Canada and Western Europe.

Anne Wolf, Accountant and Human Resources Associate is responsible for accounts payable, gift processing, and grant disbursements. She works with the Finance Team to prepare financial reports, audited financial reports and Form 990.