

Sheldon Fox Bio – January, 2022

Sheldon graduated from Duke University in 1981 with an undergraduate degree in Management Science/Accounting.

He joined Peat, Marwick & Mitchell (now KPMG) in Raleigh in early 1982 and was admitted as a tax partner in 1993. During his 16 + year career at KPMG he served publicly-traded financial services corporations, privately-owned businesses in several industries and high net worth individuals.

In 1998, Sheldon joined CCB in Durham as chief financial officer and following CCB's merger in 2000 with National Commerce Financial, he moved to Memphis, TN to become CFO of National Commerce (approximately \$5 billion market cap). Sheldon left National Commerce in 2003, and he and his family returned to Raleigh in 2004.

In 2004, Sheldon joined Maynard Capital Partners (now KDI Capital Partners) and became a member of the firm in 2007. He served as the investment management firm's Chief Operating Officer, responsible for client relations and administration until March 31, 2019. On the investment side, Sheldon managed KDI's Value Preservation options strategy from its inception in 2009 through its termination in 2019 and was co-manager of the firm's Core Equities strategy until March 31, 2019. From April 1, 2019 until December 31, 2021, Sheldon led KDI's efforts to develop a financial planning practice focused on multi-generational high net worth families.

Effective January 1, 2022, Sheldon is continuing his financial planning focus as Senior Director, Family Office Services, with Curi Capital, a Raleigh, NC Registered Investment Adviser, that acquired the assets of KDI's advisory business.

Sheldon is 61, and has been married to his wife, Debbie for 38 years. They have two sons and two grandsons. Sheldon continues to hold an active CPA license. He is also a candidate for CFP® certification.

Sheldon has been very active in the community in the Triangle and has served on several nonprofit boards. He currently serves on the board and is chair of the Investment Committee at Triangle Community Foundation. He has previously chaired the boards of United Arts Council of Raleigh and Wake County and WakeMed Foundation.