Founded in 1993, LSBB Family Office is one of Canada's leading wealth management teams, with over $1.7 billion in assets under administration. Our team of professionals offers over 100 years of combined wealth management experience to draw from and several members of our team hold various designations, accreditations and degrees including:

- CFP® – Certified Financial Planner
- CIM® – Chartered Investment Manager
- CFA – Chartered Financial Analyst
- FMA – Financial Management Advisor
- FCSI® – Fellow of Canadian Securities Institute
- LL.B. – Bachelor of Laws

Our mission is to provide our clients with tailored Investment and Wealth Planning, Portfolio Management Advice, Estate Planning Strategies in collaboration with other TD Specialists and other services. We help our clients navigate through their investment decisions, identify risks that may impact their portfolios and educate them on financial strategies.

Standing at the heart of our practice is the one-on-one relationship we build with each client. That relationship is based on, and driven by, a strong level of personal trust, communication and understanding. It covers discretionary and non-discretionary investment planning and lifestyle protection, real estate and education funding, strategic retirement planning, inter-generational wealth transfer and legacy creation. All are interconnected and we believe that no effective total wealth plan can afford to ignore them.

Through our long-lasting relationships with other TD specialists and other professionals, we are positioned to provide our clients with access to specialized advice on virtually every aspect of their financial and wealth planning needs.

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TD

The value that LSBB Family Office brings to our client relationships

Our goal is to provide our clients with the highest level of personalized client service. Our mission is to use our extensive experience and resources to deliver the highest quality wealth and investment advice to help our clients achieve their financial goals.

- Comprehensive written Investment and Wealth Plans
- Tax minimization strategies
- Regular Financial Independence and Retirement Projections
- Portfolio Management: Discretionary or Non-Discretionary with focus on delivering strong risk-adjusted returns while maximizing downside protection
- Estate Planning Strategies
- Educational Savings Strategies
- Access to leading global money managers and independent research
- Access to leading research from analysts at TD Securities Inc. and TD Wealth

Our clients benefit from seamless access to other specialists, who offer advice in the following areas:

- Life and Disability Insurance Planning
- Business Succession Planning
- Private Banking and Credit Solutions
- Charitable Giving Strategies
- TD Wealth services which include tax lawyers and accountants

LSBB Family Office team members regularly coordinate planning with other industry professionals to help ensure that various aspects of your wealth situation are considered within the context of your investment and wealth plan.

This may include:

- Tax preparation
- Wills, powers of attorney and living wills
- U.S. tax planning services for US Citizens / Green Card Holders

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Family Office

TD Wealth Private Investment Advice
308-85 Enterprise Blvd, Markham, ON L6G 0B5
T: 905 474 3116 | TF: 833 474 3116 | F: 905 474 3783
E: lsbb@td.com | lsbbfamilyoffice.com

6065-0219_PC