



Founded in 1993, LSBB Family Office is one of Canada's leading wealth management teams, with over \$1 billion in assets under administration. Our team of professionals offers over 100 years of combined wealth management experience to draw from, and we hold the following professional designations:

CFP® – Certified Financial Planner

CIM® – Chartered Investment Manager

CFA – Chartered Financial Analyst

FMA – Financial Management Advisor

FCSI® – Fellow Canadian Securities Institute

LL.B. – Lawyer

Our mission is to provide our clients with tailored Investment and Wealth Planning, Estate Planning and Portfolio Management Advice. We help our clients navigate through their investment decisions, identify all risks that will 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, an unparalleled 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 inter-connected and no effective total wealth plan can afford to ignore them.

Through our long-standing relationships with accountants, lawyers, estate planning 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.



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
- Educational Savings Strategies
- Access to world class money managers and independent research
- Access to leading research from top analysts at TD Securities and TD Wealth

LSBB | Lee Stuart Bryson Biro
Family Office

Our clients will benefit from seamless access to other TD 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 Advisory Services which include tax lawyers, accountants and business succession planning specialists

LSBB Family Office team members regularly coordinate planning with other industry professionals to help ensure that all 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
- US tax planning services for US Citizens / Green Card Holders

TD Wealth Private Investment Advice

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LSBB Lee Stuart Bryson Biro Family Office consists of Benjamin A Lee, Senior Vice President, Portfolio Manager, Investment Advisor; Stephen W Stuart, Investment Advisor; Wayne Bryson, Vice President, Portfolio Manager, Investment Advisor; and Tara Biro, Investment Advisor. LSBB Lee Stuart Bryson Biro Family Office is a part of TD Wealth Private Investment Advice. All insurance products and services are offered by life licensed advisors of TD Waterhouse Insurance Services Inc., a member of TD Bank Group. TD Wealth represents the products and services offered by TD Waterhouse Canada Inc. (Member – Canadian Investor Protection Fund), TD Waterhouse Private Investment Counsel Inc., TD Wealth Private Banking (offered by The Toronto-Dominion Bank) and TD Wealth Private Trust (offered by The Canada Trust Company). TD Wealth Private Investment Advice is a division of TD Waterhouse Canada Inc., a subsidiary of The Toronto-Dominion Bank. TD Waterhouse Canada Inc. – Member Canadian Investor Protection Fund. © The TD logo and other trade-marks are the property of The Toronto-Dominion Bank.

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