

Have you consulted one of our experts?

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

Guidance when reviewing your will and estate plan:



Mindi Banach, JD Tax and Estate Planner TD Wealth

Support tackling complex tax issues:



Charley Tsai LL.B, CFP, TEP Vice President, High Net Worth Planner Wealth Advisory Services

Maximizing the market value of your business:



Geoffrey Smith BA (Hons), LL.B. Vice President, Business Succession Advisor Wealth Advisory Services

Answering your insurance questions:



Bob Izatt CFP®, CLU™, CH.F.C. Vice President and Estate Planning Advisor TD Wealth Insurance Services Wealth Advisory Services



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.

Contact our team today to learn more

Lee Stuart Bryson Biro Family Office

TD Wealth Private Investment Advice

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