

# Lee Stuart Bryson Biro Family Office



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■ Appointments

■ Administrative support

■ Contact information changes

**Contact Rose or Yubin**

■ Trade execution

■ Research opinion or request

■ Investment and wealth planning/taxation queries

■ Stock and mutual fund inquiries

■ Questions on new/existing insurance strategies

■ RSP/RIF withdrawals

■ New account requirements

Contact  
Vincent, Thor,  
Kenneth, or  
Cheuk

■ Change updates to monthly transfers  
or contributions

■ Tax forms required for  
accountant/tax returns

■ Documentation updates

■ Funds transfers

Contact Eliza,  
Jennifer or  
Adrienne

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**TD Wealth** | 