



## Have you consulted one of the Specialists at TD Wealth?

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  
Wealth Advisory Services,  
TD Wealth

Support tackling  
complex tax issues:



**Charley Tsai**  
LL.B, CFP, TEP

Vice President,  
High Net Worth Planner  
Wealth Advisory Services,  
TD Wealth

Help maximize the market  
value of your business:



**Geoffrey Smith**  
BA (Hons), LL.B.

Vice President,  
Business Succession Advisor  
Wealth Advisory Services,  
TD Wealth

Answering your  
insurance questions:



**Bob Izatt CFP®, CLU®, CH.F.C.**

Vice President,  
Estate Planning Advisor  
TD Wealth Insurance 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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**LSBB** | Lee Stuart Bryson Biro  
Family Office

**TD Wealth** |



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