

## Bryan J. Staniszewski CFP®, CPA/PFS, AIF®, MBA

Director of Wealth Management  
and Planning

bstaniszewski@LumsdenCPA.com



Bryan joined Lumsden & McCormick Financial Services in 2012 with over 15 years of experience in investment services. Bryan delivers custom, holistic solutions that fit an individual's entire financial situation understanding the importance of cash flow, the role of taxes, wealth preservation, and how legacy building and overall wealth goals foster into the creation of a comprehensive wealth plan.

### EDUCATION

Canisius College, Master of Business Administration, Professional Accounting

Canisius College, Bachelor of Arts, Psychology with a minor in Human Resources and Business Management

### PROFESSIONAL

American Institute of Certified Public Accountants

- Certified Public Accountant (CPA)
- Personal Financial Specialist (PFS)

New York State Society of Certified Public Accountants

Certified Financial Planner Board of Standards

- CERTIFIED FINANCIAL PLANNER™ (CFP®)

Center for Fiduciary Studies™- Accredited Investment Fiduciary® (AIF®)

Passed Series 7 and 66 securities exam – Financial Advisor\*

### COMMUNITY

Buffalo District Soccer League, President 2010-2016, 1st VP 2006-2010

*\*Securities offered through Avantax Investment Services <sup>SM</sup>, Member FINRA, SIPC. Investment Advisory services offered through Avantax Advisory Services <sup>SM</sup>. Insurance services offered through an Avantax affiliated insurance agency.*