



Lee Grimshaw, CFA®, ICD

Portfolio Manager

Lee joined IAIC in 2019. As a Portfolio Manager, Lee focuses on advising individuals, households and corporations on suitable investment decisions to meet their financial goals. Lee is a member of the finance sector research team at IAIC and works closely with the financial planning team and accounting partners to provide investment advice.

Lee graduated with a Bachelor of Commerce (Honours), an MBA, and obtained both his Chartered Financial Analyst (CFA®) and Institute of Corporate Directors designations. Lee holds memberships in the CFA Institute and the Toronto Society of Financial Analysts.

Lee has over 30 years of combined leveraged buyout, corporate finance and governance (as Board Member) experience. In addition, Lee spent 14 years at a major chartered bank as Managing Director of the bank's proprietary \$600M evergreen pool of private equity and high yield debt capital as principal investor. Lee was a member of the funds investment committee, management committee and had regional oversight of both direct and limited partnership investments, and regional team management.



Direct: 226-243-7682 / Mobile: 519-444-8990



leeg@iaic.ca



1A-510 Weber Street North, Waterloo, ON N2L 4E9