

## **Reflections on a Trailblazer for International Women's Day**

Hello LeRoy Wealth Management Group,

Last year we introduced you to Lillice LeRoy (nee Read), Sonia's grandmother and Adrian's great-grandmother in our newsletter, [Learning about the 'G' in ESG for International Women's Day](#). Lillice, known to our Team Members, Sonia, Adrian, Rowan and Robbie as Granny, offered advice as a stockbroker for Midland Doherty in Ottawa in the 1960s, 70s and 80s. Lillice is a legend in the LeRoy family and is the inspirational founder of a dynasty of award-winning financial planners, leaders in the industry who have descended from her and are guiding their clients to achieve financial peace of mind still to this day.

Sonia recently nominated Lillice LeRoy to Wealth Professionals Canada for the *FP Canada Award for Lifetime Achievement in the Financial Planning Industry*. This is the highest honour and most coveted award at the Wealth Professional Awards. This award recognizes and celebrates a leading figure who has contributed much to the advancement of the wealth management and financial planning industry in Canada, exhibited leadership, and proved inspirational to others. We would like to share some of what made Granny so special and our reflections



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on how she left her mark in the wealth management industry and in our lives.

Lillice always understood the power of money to change lives. She gifted shares to her family members for birthdays and Christmas, instead of presents. This led to an understanding among all of her many descendants of the importance of investing. Her gifts came with an important lesson, that money comes with responsibility. When Lillice's four sons were teenagers they grew Christmas trees for sale on our family tree farm. Lillice ensured they gave generously each year from their revenues (all of it) to The March of Dimes. She also taught us that the power of money goes beyond what can be achieved by giving and for oneself. Sonia recalls being taken to annual general meetings as a child and being required to learn about the company so as to vote her share proxies responsibly. And that tree farm... Lillice organized its succession according to sound financial planning techniques so that it could remain available for the entire family over generations, regardless of means. A fifth generation of LeRoys is now enjoying The LeRoy Tree Farm and continuing the family tradition of making maple syrup, along with all our other generations. (Well, the young ones are just taste testers at this point).

Lillice was in a very limited, special category of people of her era who did not respect limitations or barriers and never paused for challenges. Even before she gained her credentials as a stockbroker, for years Lillice led an investment club in Toronto, educating herself and her friends about money in the process. When she moved to Ottawa in support of her husband's career, she had developed a tremendous interest in the stock market. She would visit her own advisor at his office daily, spending hours questioning him and learning, and watching the ticker numbers. Eventually, Lillice realized she was as or more competent than her advisor, and she took the securities course and became licensed. To Midland

Doherty's credit, they recognized Lillice's potential, and they immediately hired her as an advisor.

One of her sons remembers visiting Lillice's Midland Doherty office, fascinated at seeing his mother in front of the ticker-tape, a rare woman lined up with a sea of men. Sonia also recalls visiting her Granny at her office. But in Sonia's case, she took no note of the overwhelming male domination in the room. Rather, she only had eyes for Lillice's example, implicitly understanding that women manage the money and have really interesting jobs helping people. The inspirational power of Lillice's example would be lasting. It never occurred to Sonia or her aunt Susan Le Roy to hesitate to launch careers in what was still an overwhelmingly male-dominated industry. And Adrian, also a minority in what is a very white industry, reflects that Lillice was an example of the mindset that exterior barriers are not barriers at all, but just another reason to succeed and do whatever you set your mind to. This understanding, along with Lillice's early lessons about the power of money, would inform the future philosophies and successes of both of the award-winning advisory teams, LeRoy Wealth Management Group and The Le Roy Financial Group.

All of that inspiration has led to a wealth management dynasty. Lillice retired in the mid-1980s and passed on in 1988, two years before the first of her descendants (Sonia) entered the financial planning industry. Sonia and Adrian now lead LeRoy Wealth Management Group, a Responsible-Investment-based advisory team with IPC Securities, with offices in Ottawa and Toronto. Sonia has been recognized By Wealth Professionals and Investment Planning Counsel with awards in multiple categories for multiple years. Not long after Sonia, Lillice's daughter-in-law, Susan earned her credentials in financial planning and built a successful advisory practice in Toronto. A generation later, Chris Le Roy, another of Lillice's grandchildren joined the industry, as did Adrian, Lillice's

first great-grandchild to do so. Chris (our cousin) joined Susan, founding The Le Roy Financial Group in Toronto. He was recently recognized among Canada's Top Wealth Advisors - Best in Province, and Adrian has been nominated by Wealth Professionals Awards as well. Rowan Hughes and Robbie Hughes, two more of Lillice's great-grandchildren, have more recently joined our Team, LeRoy Wealth Management Group in financial literacy support roles, and Rowan is currently studying to gain her Financial Planning Graduate Certificate and will be the second of the fourth generation of wealth managers in the LeRoy family to follow in Lillice's footsteps, Lillice's fifth descendent to become a Wealth Manager. All of us are committed educators and financial planners, promoting philanthropy, values and objectives-based holistic wealth management for Canadians. And both our Teams are, in turn, striving to inspire our clients, educate the investing public, and encourage new generations of financial advisors.

Regardless of whether our nomination of Lillice proves successful, her legacy and impact in the wealth management community undeniably lives on, through Sonia, Chris, Susan, Adrian, Rowan and Robbie, and the hundreds of clients (and hundreds of millions of assets under management) we are privileged to advise. We are proud to follow in her footsteps.

Thank you,

Sonia & Adrian