



Wealth Optimized

avidianwealth.com



The Avidian Business Model

Designed to simplify the complexities that come with wealth

At Avidian, we collaborate as a team with you and your trusted network of professionals to ensure that all aspects of your finances are coordinated and working in line with your goals. Our engagement process is designed to help you make informed and confident decisions in the areas of financial planning, estate planning, tax strategies, risk management, and investment management.



1.

Independent registered investment advisory firm with offices in Houston and Austin.

2.

Founded in 2003 and currently advising on over \$3 billion in assets

3.

Held to the fiduciary standard of care, the highest standard in the industry

4.

Full transparency with a straightforward fee structure

5.

Open architecture for optimal client solutions

6.

Third-party custodians and reporting for client assets

“Our mission is to make a positive impact in the lives of the families we serve.”

Our professional team includes:

- ✓ CERTIFIED FINANCIAL PLANNERS™
- ✓ Certified Public Accountants
- ✓ Chartered Financial Analysts
- ✓ Investment Specialists
- ✓ MBAs
- ✓ JDs
- ✓ CEPAs

We deliver highly personalized services and solutions in a consultative, fee-based format.

Luke Patterson
Chairman, CEO



What Avidian Can Do for Your Family

- ✓ Comprehensive financial planning
- ✓ Multi-generational estate and wealth transfer planning
- ✓ Tax and estate tax strategies
- ✓ Legacy planning and charitable giving strategies
- ✓ Asset management solutions
- ✓ Investment consulting
- ✓ Portfolio review and stress testing
- ✓ Risk management strategies and insurance solutions
- ✓ Retirement planning and income strategies
- ✓ Cash flow planning
- ✓ Social security and pension maximization
- ✓ Family advisory services
- ✓ Executive planning





What Avidian Can Do for Your Business

- ✓ Structure and tax planning strategies
- ✓ Business succession planning strategies
- ✓ Business exit strategies
- ✓ Buy-sell agreement review
- ✓ Key-man plans
- ✓ Planning for key executive team
- ✓ Treasury and investment banking strategies
- ✓ Small business qualified and nonqualified retirement plans
- ✓ 10b5-1 plans
- ✓ 83(b) election advice

Third-Party Custodians



Fidelity
www.fidelity.com



Charles Schwab
www.schwab.com



Inspira Financial
www.inspirafinancial.com

Are you working with a fiduciary?

What is the fiduciary standard of care?

The fiduciary standard of care requires that a financial adviser act solely in the client's best interest when offering personalized financial advice. Unfortunately, everyone in this industry is not held to this same standard.

Avidian Wealth Solutions is proudly held to the fiduciary standard. As fiduciaries, our team is committed to always acting in our clients' best interests. This is not only a promise, it is also a legal responsibility. Clients receive honest and thorough financial advice aligned with their goals and objectives.

What are the benefits of working with a fiduciary advisor?

- ✓ Put their clients' best interests before their own, seeking the best prices and terms
- ✓ Act in good faith and provide all relevant facts to clients
- ✓ Must avoid conflicts of interest and disclose any potential conflicts of interest to clients
- ✓ Provide full transparency regarding their compensation
- ✓ Strive to provide accurate, thorough advice

Our Team

Our team is comprised of highly specialized advisors that collaborate as fiduciaries to provide clients the highest level of financial counsel and service. We provide a personalized approach to planning and investment management, offering a family office experience to high net worth individuals. With decades of experience, we have developed expertise in analyzing each client's financial picture through comprehensive financial planning. We partner with clients with the goal of helping them clearly understand their overall wealth plan while providing strategic advice and ongoing analysis.

Our advice is objective and always in the client's best interest. We are compensated through a fee-based arrangement where our goals are aligned with those of our clients. Working alongside our clients' other trusted advisors, we serve as fiduciaries to address all aspects of their financial lives. Our clients are supported by a team of CFPs, CFAs, CPAs, MBAs, and JDs located in our office. Through our collaborative approach, we work with clients to optimize their decisions and align them with their tax and financial plans.



BRADLEY T. COVEY
CFP®, Sr. Wealth Advisor,
Partner



CHRISTOPHER ROBERTS
Wealth Advisor

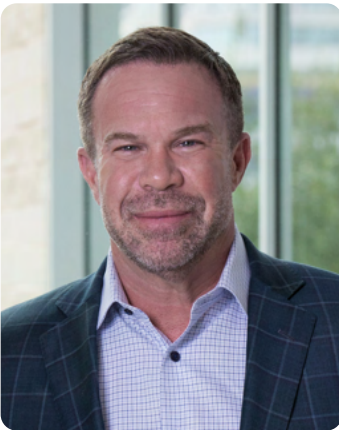


GAN LI
Wealth Management
Associate


Trusted Experience




Executive Leadership Team




LUKE PATTERSON
Chairman, CEO




JIM ATKINSON
COO, Head of M&A
Managing Partner



PRESTON SNOW
CFP®, Sr. Wealth
Advisor, Managing
Partner



HOPE EDICK
Chief Compliance
Officer



KATHERINE YARBER
Chief Accounting
Officer

Investment Management Team



JAKE BORBIDGE
CFA®, CAIA®, Chief
Investment Officer



NAN LU
Ph.D., CFA®, CAIA®,
MBA, Sr. Portfolio
Manager



ANDREI COSTAS
MBA
Portfolio Manager



ROBIN CHAN
CFA®
Trading Supervisor



CASEY HODGES
Operations Specialist

Financial Planning Team



ROBERT PALMER
JD, MBA, CFP®,
CHFC®
Director of Financial
Planning



STEPHEN KIRBY
JD
Financial Planner



Important Disclosure Information

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