AVIDIAN

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.

AVIDIAN

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 Practice

- Data Gathering
- Current & Projected Tax Analysis
- Goals, Needs, Wants Analysis
- Strategies Supporting Settlement Decisions
- Short & Long-Term Modeling
- Expectations Management
- Education/Financial Literacy
- On-Going Financial Planning
- Family Office Enviroment

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.

JAMES MCGINNESS
Wealth Advisor

MINDY ABRAHAM
Wealth Management Associate

TAYLOR MOTSINGER
Wealth Management Associate

Trusted Experience

14 CFPs	3 CFAs	7 MBAs
3 CEPAs	2 JDs	1 PHD

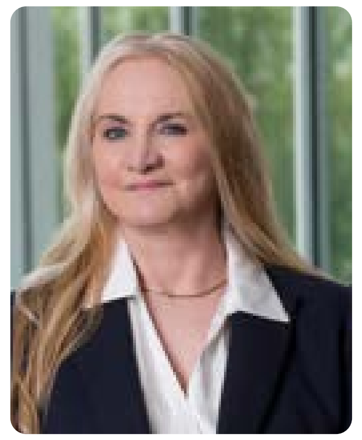
Executive Leadership Team

LUKE PATTERSON
Chairman, CEO

JIM ATKINSON
COO,Head of M&A
Managing Partner

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

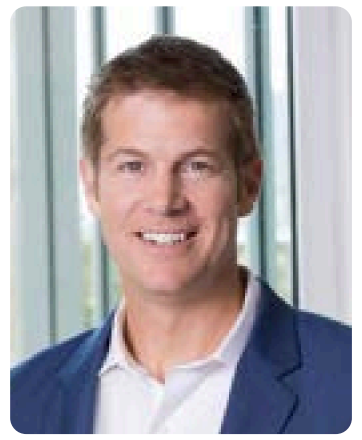
HOPE EDICK
Chief Compliance Officer



KATHERINE YARBER
Chief Accounting Officer

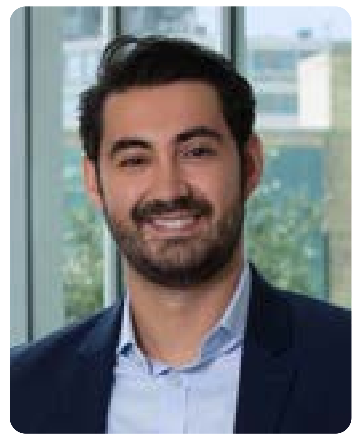
RACHEL DANIELS
Director of Operations, Head of Transitions

Investment Management Team

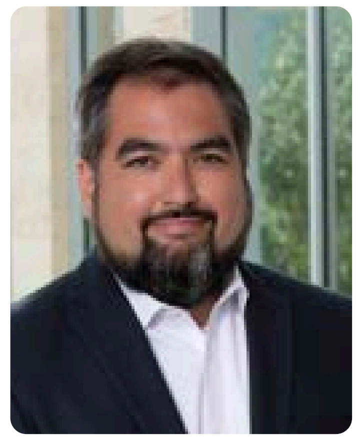


JAKE BORBIDGE
CFA®, CAIA®, Chief Investment Officer

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



ANDREI COSTAS
MBA
Portfolio Manager

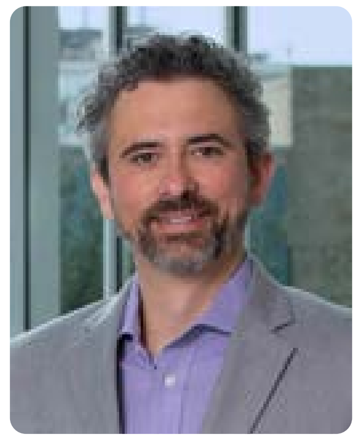


ROBIN CHAN
CFA®
Trading Supervisor

CASEY HODGES
Operations Specialist

Financial Planning Team

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



STEPHEN KIRBY
JD
Financial Planner

James McGinness

Wealth Advisor

James McGinness is a Wealth Advisor at Avidian, where he is focused on developing and managing client relationships for high-net-worth individuals, endowments, and foundations. He serves clients to help steward their resources by implementing a disciplined investment plan to align with each client's goals and values to achieve long-term results.

Previously, James served as Managing Director and Financial Advisor at a large financial advisory firm. James began his career as a Portfolio Analyst at RDG Capital LLC, and then joined Salient Partners, where he focused on investor relations, trading, and operations before becoming a Financial Advisor at Salient.

He knew he wanted to become an advisor after working as an intern at an RIA – a far cry from his original dream of becoming a firefighter. James earned a Bachelor of Business Administration from the University of Houston –Downtown and completed the Texas Trust School at Southern Methodist University. James holds Series 63 and 65 licenses.

James and his wife are the proud parents of twin sons and a daughter. He is a native Houstonian, an active member of Houston's First Baptist Church, and a partner of 100X Harvest ministry. He enjoys traveling with his family and coaching youth sports.

Education

- BBA, University of Houston – Downtown

Contact

(281) 822-8813

jamesmcginness@avidianwealth.com

Mindy Abraham

Wealth Management Associate

Mindy began her career as a Wealth Management Intern at Willis Johnson & Associates, gaining valuable experience that set the foundation for her career.

During this time, she developed a strong passion for prioritizing clients, having witnessed the direct impact of strategic financial management on their lives. This hands-on internship deepened her understanding of the industry and solidified her commitment to a career focused on serving and prioritizing clients' needs.

Mindy holds a Master of Science in Finance from the University of Houston and a Bachelor of Business Administration in Economics from Midwestern State University.

Education

- Master of Science in Finance, University of Houston
- Bachelor of Business Administration in Economics, Midwestern State University

Contact

(281) 699-9665

mindyabraham@avidianwealth.com

Taylor Motsinger

Wealth Management Associate

Taylor joined Avidian in January of 2023. Before her time at Avidian, she was the director of business development at RJ Capital, handling client requests and firm operations.

Taylor graduated from Florida State University in 2018 with a bachelor's degree inPsychology and Entrepreneurship. She was a part of the first graduating class of the Jim Moran College of Entrepreneurship at Florida State. In 2022, Taylor earned her Series 65 license and became an Investment Advisor Representative.

Taylor enjoys volunteering with the Houston Livestock Show and Rodeo in her free time.

Education

- Bachelor's in Psychology and Entrepreneurship, Florida State University

Contact

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Important Disclosure Information

Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Avidian Wealth Solutions (“Avidian”), or any non-investment related services will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Avidian is neither a law firm nor an accounting firm, and no portion of its services should be construed as legal or accounting advice. Moreover, you should not assume that any discussion or information in this document serves as the receipt of, or as a substitute for, personalized investment advice from Avidian. Please remember that it remains your responsibility to advise Avidian, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure brochure discussing our advisory services and fees is available upon request. The scope of the services to be provided depends upon the needs of the client and the terms of the engagement.

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