AVIDIAN

WEALTH SOLUTIONS

Secure Your Wealth. Simplify Your Life.

A boutique family office experience designed for founders, executives, entrepreneurs and families. A fiduciary partnership for foundations and endowments.

Founded in 2003, Avidian Wealth Solutions is an independent registered investment advisory firm with offices in Houston and Austin, dedicated to making a positive impact in the lives of the families we serve. As fiduciaries, we uphold the highest standard of care in the industry, delivering full transparency through a straightforward fee structure and open architecture that ensures optimal, customized solutions for every client.

Partnering with trusted third-party custodians Fidelity, Schwab, and Inspira Financial, we provide secure, reliable reporting and management of your assets, always prioritizing your long-term success and peace of mind.

$4.6B

In client assets under management*

56

Financial professionals

23

Years of success

*As of December 31, 2025. This number reflects Avidian's regulatory assets under management (RAUM) as calculated consistent with the instructions to Form ADV Part 1A. Our firm updates this number quarterly to reflect AUM as of the most recent calendar quarter-end. The amount reported here may differ from the figure in our most recently filed Form ADV, which reports AUM as of December 31, 2024.

Our Full-Circle Approach to Wealth Management

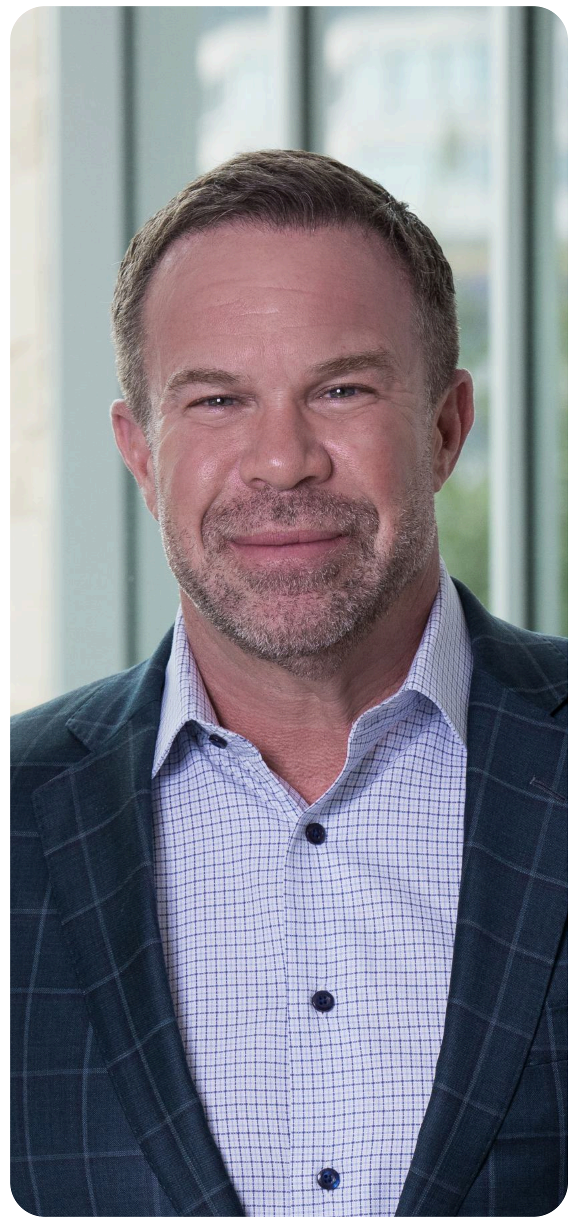
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

At Avidian Wealth Solutions, we take a holistic, fiduciary-first approach to safeguarding and growing your legacy. Our experienced multidisciplinary team delivers personalized strategies that integrate investment management, financial planning, estate preservation, tax optimization, and risk mitigation, tailored to evolve with your unique goals and life stages, so you can focus on what matters most: your family and future.

Experience the Avidian difference: fiduciary guidance that prioritizes your best interests, every step of the way.
www.avidianwealth.com

Executive Leadership

Trusted Experience



Luke Patterson
Chairman
Chief Executive Officer

Jim Atkinson
Managing Partner
Head of M&A

Preston Snow, CFP®
Managing Partner
Sr. Wealth Advisor

Shaheen Ladhani
Managing Partner
Chief Revenue Officer

Jake Borbidge, CFA®, CAIA®
Partner
Chief Investment Officer

Katherine Yarber
Chief Accounting Officer

Hope Edick
Chief Compliance Officer

Rachel Daniels
Director of Operations
Head of Advisor Transitions

Investment Team

Strategies for Families, Owners & Institutions

Guided by our mission to provide institutional-grade investment strategies to the clients we serve, we craft sophisticated, customized portfolios. Our Investment Team is dedicated to serving high-net-worth families, business owners, foundations, and endowments seeking enduring financial security and growth.

Jake Borbidge, CFA®, CAIA®
Partner
Chief Investment Officer

Nan Lu, CFA®, CAIA
Sr. Portfolio Manager
PhD, MBA

Andrei Costas
Portfolio Manager
MBA

Robin Chan, CFA®
Trading Supervisor

J. Casey Hodges
Operations Specialist

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.

Please Note: Neither rankings and/or recognition by unaffiliated rating services, publications, or other organizations, nor the achievement of any designation or certification, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Avidian is engaged, or continues to be engaged, to provide investment advisory services. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers. No ranking or recognition should be construed as a current or past endorsement of Avidian by any of its clients. ANY QUESTIONS: Avidian’s Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions, including providing the criteria used for any reflected ranking.