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	56	23
In client assets under management*	Financial professionals	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

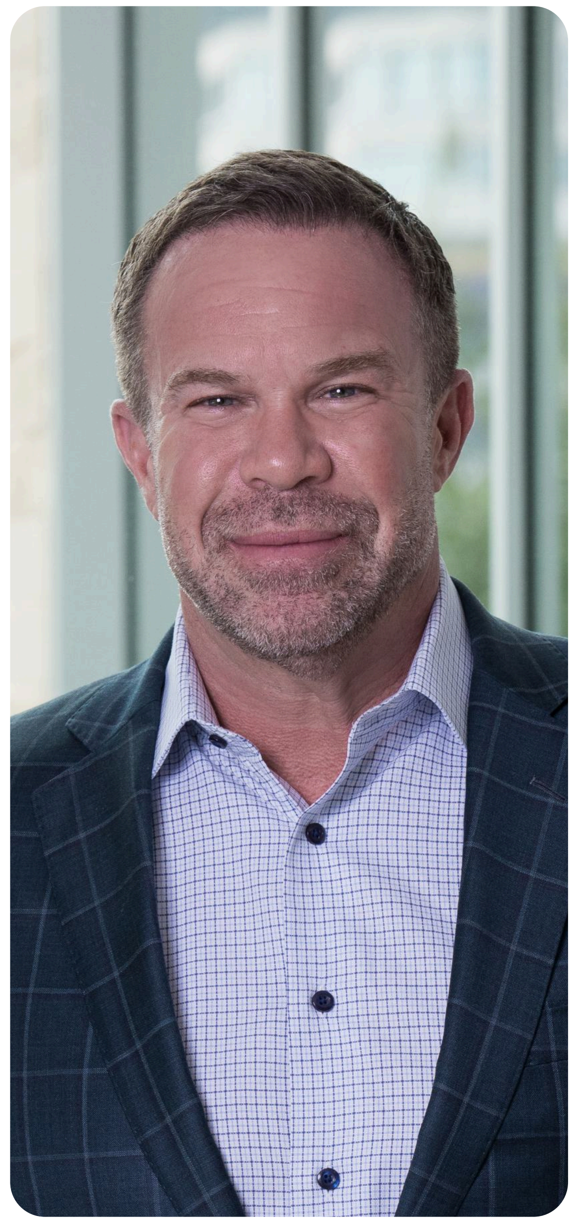
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Carter Blackburn

Partner, Wealth Advisor, M&A Specialist

Carter Blackburn is a Partner at Avidian Wealth Solutions, where he works closely with business owners and multi-generational families navigating complexity, liquidity events, and long-term capital strategy. His approach is rooted in comprehensive planning and institutional-caliber investment management, designed to help clients preserve and grow their wealth.

Since joining Avidian in 2017, Carter has served in a dual capacity: advising clients at the highest level while also contributing to the firm's strategic growth and M&A initiatives. This vantage point allows him to guide entrepreneurs with a rare combination of hands-on personal counsel and firm-wide perspective. A core focus of Carter's work is sourcing and utilizing private investment opportunities for his clients. He has a deep passion for private deals and frequently helps families access and evaluate differentiated opportunities across private equity, venture, private credit, and thematic investments, always with an emphasis on alignment, due diligence, and long-term risk-adjusted outcomes.

Prior to Avidian, Carter spent over a decade in the entertainment business working alongside senior executives and leadership teams at Fortune 500 companies including Toyota, Waste Management, and HP. He brings that same disciplined, outcome-oriented mindset to private wealth management. Earlier in his career, Carter also served as an associate youth pastor at Second Baptist Church, an experience that shaped his long-term, values-driven approach to leadership and relationships.

Carter is a proud Eagle Scout, a distinction that reflect a lifelong commitment to leadership, accountability, and service. He lives in Cypress, Texas with his wife, Sarah, and their two children. Outside of work, Carter enjoys traveling and building lasting memories with his family.

carterblackburn@avdianwealth.com

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Jacob Borbidge

CFA®, CAIA®
Partner, Chief Investment Officer

Jacob Borbidge is the Chief Investment Officer for Avidian Wealth Solutions.

Before assuming this role, Jake spent 19 years serving multiple positions for Invesco Advisors. Most recently, he was the Senior Portfolio Manager and Global Head of Research for the Invesco Investment Solutions Team in Houston, TX. As a founding member of the Solutions Team, he oversaw the investment process for the breadth of Invesco's multi-asset solutions portfolios and models, directed the research initiatives of the Solutions investment team, and served as the face of the investment team to clients and prospects.

Jake also spent 10 years as an analyst for the Invesco Global Quantitative Strategies team, where he developed active quantitative equity strategies across various equity markets. When he entered the industry, he was a mechanical engineer with ExxonMobil.

Jake earned a BS in mechanical engineering from Lehigh University and an MS in finance from the University of Houston. He is a CFA charter holder and holds the CAIA designation.

While not a native to the Lone Star State, Jake "got here as quickly as he could" and has been a Texan long enough to call himself one. In his spare time, he can usually be found with his family outdoors on a beach, hiking, fishing, hunting, skiing, or mountain biking. He is passionate about international missions and youth ministry and actively participates in both while attending Sugar Creek Baptist Church.

Jennifer Garrett

Associate Manager

Jennifer Garrett joined Avidian Wealth Solutions in November 2008 and currently serves as Associate Manager. In her role, Jennifer leads the operations team, providing oversight and support to ensure consistent service delivery, while also contributing to firm-wide initiatives including process improvement and M&A integration.

In addition to her leadership responsibilities, she continues to support a select group of Avidian Wealth Advisors and their clients with comprehensive service, daily operations, and portfolio maintenance.

Jennifer attended Lone Star College, where she earned an Associate of Arts degree. She resides in Katy with her husband and daughter and enjoys spending time with family and friends, cooking, reading, and running.

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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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