



# A Better Path Forward

Discover why Avidian Wealth Solutions is becoming the premier destination for advisors.

[www.avidianwealth.com](http://www.avidianwealth.com)

 Window Trail, Big Bend National Park

**\$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.





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Driving long-term success starts by empowering advisors to put clients needs first. Avidian provides a transparent, collaborative environment supported by a tech forward platform that delivers results.

**Luke Patterson**

Chairman and CEO, Avidian Wealth Solutions

# What Do You Gain by Partnering with Avidian?

## Freedom

### Client-Centric Focus

- ✓ **Tailored Service**  
Serve your clients with the flexibility to prioritize their unique needs, free from corporate mandates or product quotas.
- ✓ **Streamlined Compliance**  
Focus on delivering timely, client-first solutions.
- ✓ **Simple, Transparent Payout**  
Benefit from a straightforward payout structure with no hidden fees or complex calculations.

## Future

### Build a Practice That Endures

- ✓ **Cutting-Edge Technology**  
Leverage our advanced suite of tools all designed to streamline your workflow and enhance client relationships.
- ✓ **Professional Growth**  
Access ongoing education, training, and resources to stay ahead of industry trends and best practices, ensuring delivery of exceptional value to your clients.
- ✓ **Succession Planning**  
Secure your legacy with our tailored Freedom Plan, ensuring continuity for your clients and your practice. You leave when you're ready.

## Culture

### Join a Firm Aligned with Your Goals

- ✓ **Employee-Owned Advantage**  
As a Texas based, employee-owned firm, our interests align with yours, fostering a partnership that's free from external pressures.
- ✓ **Open Environment**  
Benefit from clear communication and a consistent payout grid, eliminating distractions so you can focus on what matters most, your clients.
- ✓ **Collaborative Network**  
Engage with a community of like-minded advisors, where shared insights and support elevate everyone's success.



AN INDUSTRY FIRST

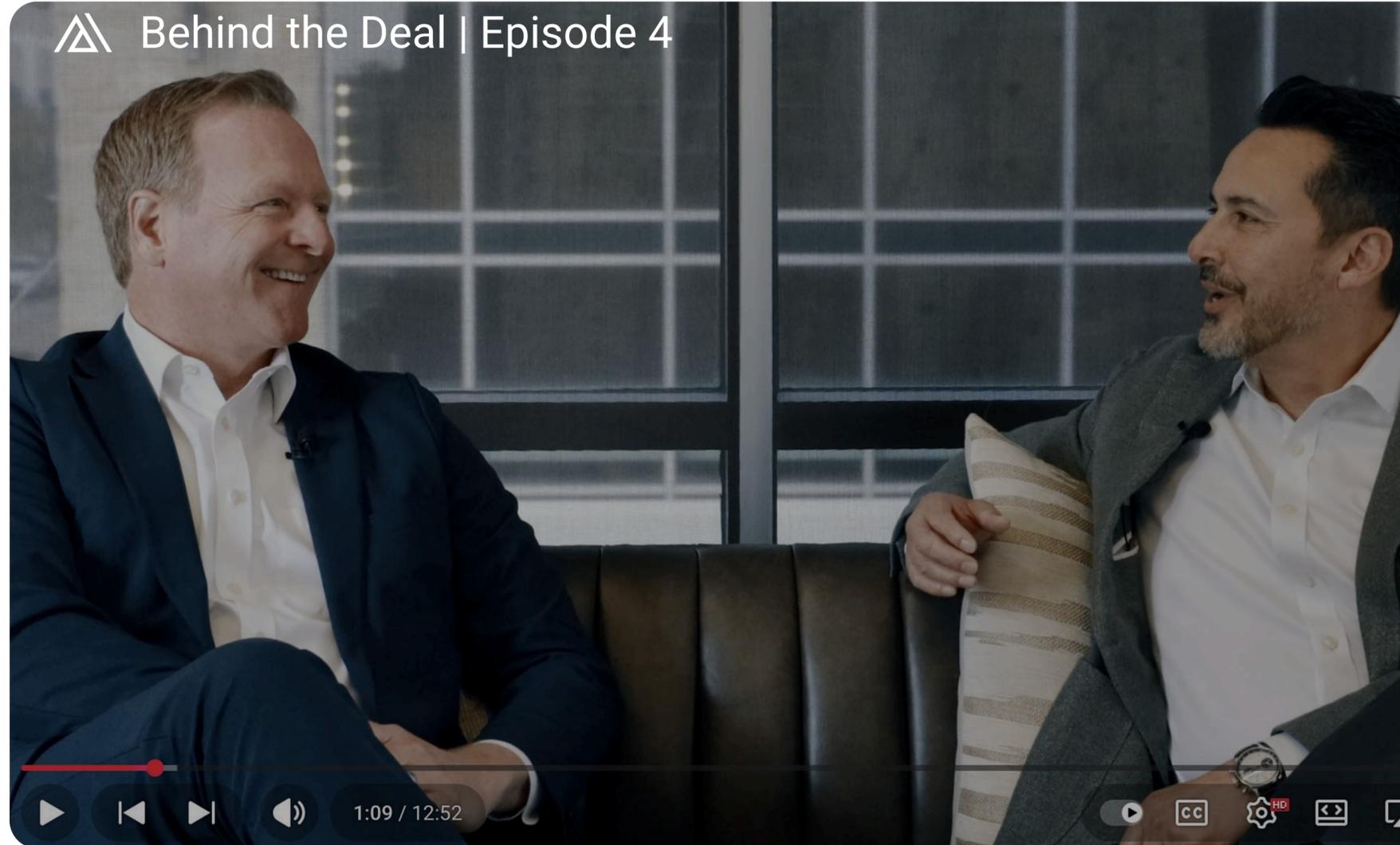
## A Wealth Advisor's Journey to Avidian, Chronicled Every Step of the Way.

Behind the Deal is a groundbreaking YouTube series from Avidian Wealth Solutions, offering an exclusive look into the real-life journey of a wealth advisor transitioning to the firm. Each episode documents Greg Litts's decision-making process, challenges, and triumphs as he chooses Avidian's client-centric, employee-owned RIA platform to elevate his practice. This first-of-its-kind series showcases why advisors are drawn to Avidian's innovative approach to wealth management, making it a must-watch for industry professionals seeking inspiration and growth.

WATCH NOW 

 YouTube

 Behind the Deal | Episode 4



# Case Study

Unleashing Potential Through Tech Innovation.



**Morgan Stone**

MBA, CFP®, CEPA®

📍 Austin, Texas

## THE CHALLENGE

Morgan was seeking faster growth for his business, but struggled to offer complex planning and investment solutions. Due to limited access to advanced tools and resources, his ability to attract larger clients was capped.

## THE SOLUTION

Avidian's cutting-edge technology, comprehensive wealth management services, and white glove experience enabled Morgan to grow and attract sophisticated high-net-worth clients with confidence.

Hear more  
from Morgan



# Case Study

Looking Beyond Goldman Sachs for Comprehensive Client Solutions.



**Shaheen Ladhani**

Managing Partner

📍 Houston, Texas

## THE CHALLENGE

At a Goldman Sachs, Shaheen felt constrained by inflexible product offerings and firm-driven priorities, which restricted his ability to tailor solutions for his high-net-worth clients.

## THE SOLUTION

Avidian's fiduciary, open-architecture platform and boutique family office model gave Shaheen the freedom to design bespoke strategies, backed by a team of CFPs, CFAs, and CPAs. He's energized by Avidian's equity opportunities and client-centric culture.

Hear more from Shaheen  YouTube



# Case Study

Crafting an Exit While Securing a Legacy.



**Jenny Fleming**

Wealth Advisor  
CPA, PFS

 Austin, Texas

## THE CHALLENGE

Jenny sought an exit strategy and a landing spot for her clients and staff, prioritizing a firm free from private equity influence. Her top priority was ensuring her clients received a tailored experience matching or exceeding her high standards of personalized service and client-centric ethos.

## THE SOLUTION

Avidian's robust platform, including advanced technology and a dedicated operations team, streamlined her administrative workload, while its collaborative culture and marketing support amplified her client acquisition efforts. Jenny now focuses on crafting personalized plans for ultra-high-net-worth clients.

Hear more  
from Jenny



# Avidian Advisor Success by the Numbers

Real Numbers, Real Success: Far Beyond Industry Averages, Avidian advisors are Outgrowing the Pack by a Wide Margin

**12.32%**

Reflects the Avidian 1-Year Average  
Advisor Revenue Growth

**95.46%**

Represents the average client  
transition retention rate 12-month post  
close since January of 2023

**21.69%**

Indicates the Avidian 5-Year CAGR  
compared to the industry avg. of  
6-8%.

Source: Statista.com



# Chris Brown

Regional Director, M&A

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## Explore a better path

One of the best ways to know if we're the right next step in your career journey is to schedule a quick conversation. Simply fill out our quick confidential form, and a member of our team will contact you shortly.

First Name* John	Last Name* Doe
Email Address* johndoe@...	Phone* (832) 648-4789
RIA or Broker Dealer -	

[SCHEDULE NOW >](#)





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