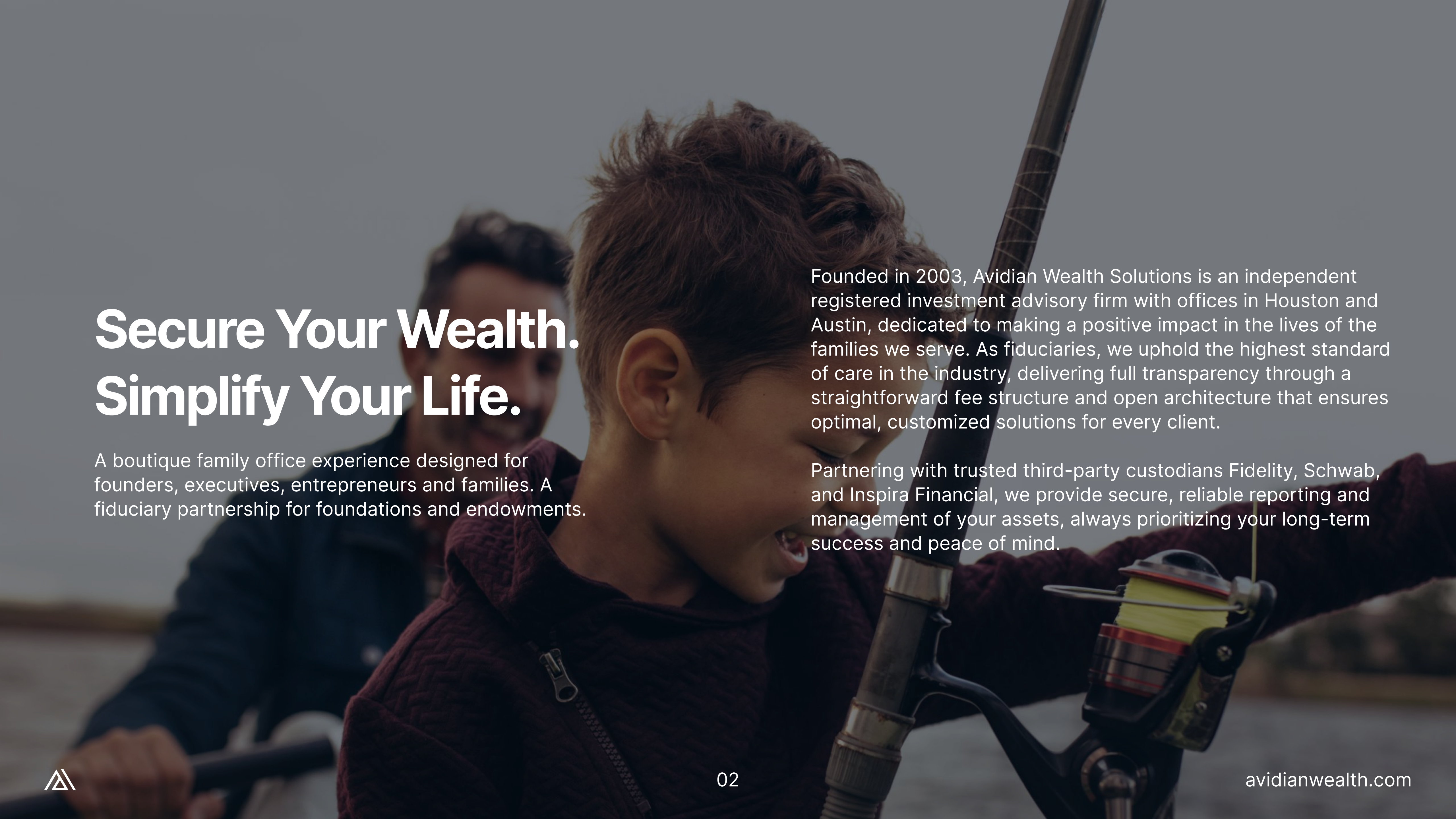




A young boy with brown hair, wearing a dark red jacket, is focused on fishing. He is holding a fishing rod with a yellow and red reel. In the background, a man with dark hair is smiling and watching him. The scene is set outdoors, likely on a boat or near a body of water.

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.



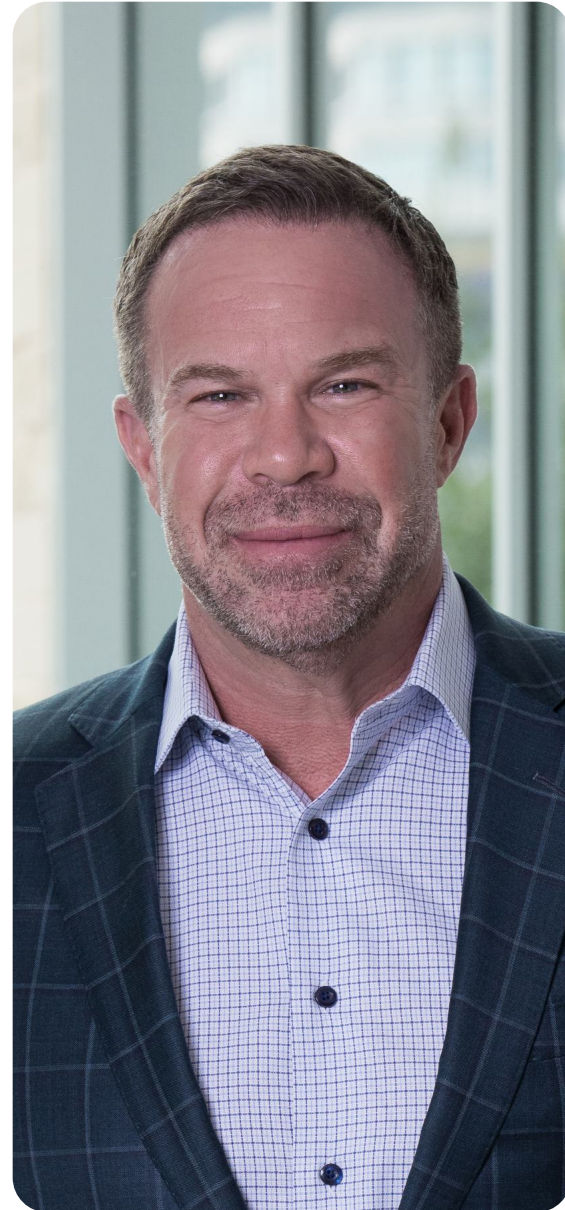
At Avidian Wealth Solutions, we take a holistic, fiduciary-first approach to safeguarding and growing your legacy. Our experienced multidisciplinary team delivers personalized strategies that integrate investment management, financial planning, estate preservation, tax optimization, and risk mitigation, 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



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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



Karl Krueger

Sr. Wealth Advisor

Karl Krueger is a native Houstonian and has worked in the financial services industry since 1994. Karl joined Avidian Wealth Solutions in 2015 after having worked at Fidelity Investments for the prior 11 years.

Karl has extensive experience in financial planning and investments and has consulted with hundreds of individuals and families in the pursuit of their personal financial goals.

Karl is a graduate of Texas A&M University with a Bachelor of Science degree in Political Science and History. Karl and his wife Johanna have two sons and have lived in Katy since 1999.

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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.

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Important Disclosure Information

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