

 **AVIDIAN**
WEALTH SOLUTIONS

A family of five is walking through a field of tall, golden grass at sunset. The father is on the left, wearing a dark jacket and a light scarf. The mother is in the center, wearing a white top and a dark vest. They are followed by three children: a girl in a dark jacket, a boy in a white jacket, and a girl in a pink jacket. The background shows rolling hills under a warm, orange sky.

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



Shaheen Ladhani

Managing Partner

Shaheen Ladhani is a senior investment professional and wealth advisor to Avidian Family Office clients. He works closely with ultra-high-net-worth families to design and oversee sophisticated investment strategies, coordinate across trusted advisors, and support long-term wealth preservation across generations.

Prior to joining Avidian, Shaheen spent 13 years at Goldman Sachs & Co. in Houston as an Investment Advisor, managing complex portfolios for private clients, endowments, and foundations. Earlier in his career, he held leadership roles at Rice University's Jones Graduate School of Business, including Director of Corporate & Foundation Relations and Adjunct Professor in the MBA program.

Shaheen currently serves as Chair of the Investment Committees for The Center for Pursuit in Houston and the Intercollegiate Tennis Association. He holds undergraduate and MBA degrees from Rice University and a master's degree in Performance Psychology from the University of Houston.

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Bobby Arenivas

CFP®, AEP®

Wealth Advisor

Bobby Arenivas is a financial advisor with a wealth management and financial planning background cultivated through roles at Mercer Advisors, Kanaly Trust, US Trust, and Dowling & Yahnke. His experience spans estate planning, multigenerational planning, income tax strategies, and investment management. Bobby has the CERTIFIED FINANCIAL PLANNER® and Accredited Estate Planner (AEP®) designations, which underscores his commitment to excellence and professionalism in the field.

He earned his Bachelor of Science Degree in Personal Financial Planning from Texas Tech University, where he laid the groundwork for his career in finance. Bobby resides in Houston's Greater East End area and balances his professional pursuits with a passion for music, cooking, and outdoor activities.

At Avidian, Bobby continues to leverage his comprehensive skill set and dedication to client satisfaction, providing tailored financial solutions that empower clients to confidently navigate their financial futures.

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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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Lionel Kiki

AWMA®

Wealth Management Associate

Lionel (Lio) Kiki serves as a Wealth Management Associate at Avidian Wealth, where he focuses on delivering exceptional client experiences through onboarding, day-to-day support, and ongoing account maintenance. Lio supports client transitions, responds to day-to-day service needs, and assists in maintaining accurate and current account information for advisors and client families.

Lio brings a strong foundation in private wealth management, financial services operations, and client relationship management. His prior experience includes supporting ultra-high-net-worth individuals, families, and institutions across a wide range of investment, planning, and service needs. He has worked closely with advisory teams on portfolio implementation, compliance processes, and cashiering functions, always prioritizing attention to detail and client-centric outcomes.

He holds a Bachelor of Science in Business Administration and Management from Skidmore College. Lio also holds the Series 7 and Series 66 securities licenses, as well as the Accredited Wealth Management Advisor (AWMA®) designation.

Outside of work, Lio stays active and enjoys continuous learning. Above all, he cherishes moments with his wife and their golden doodle.

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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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