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

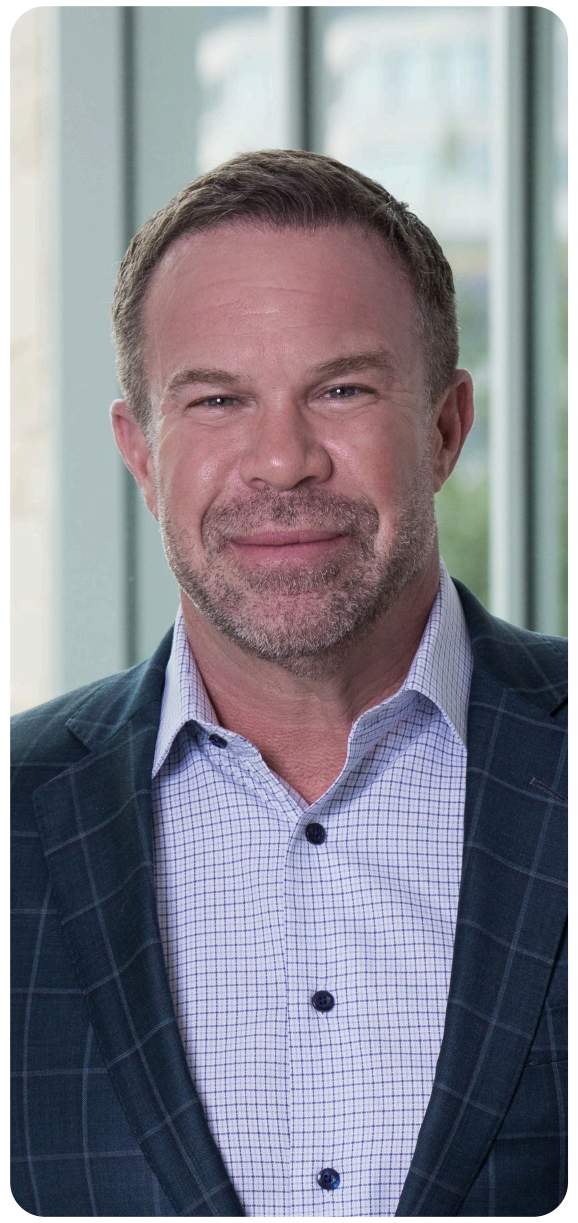
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Nicolas J. Knapik

Wealth Advisor

Nicolas began his career in the financial services industry in 1997. Prior to joining Avidian, he was a Financial Advisor with RJ Capital. In addition, he previously was a Managing Partner and Chief Compliance Officer with TMFS, Vice President of the Private Client Division at Charles Schwab and an Advisor at Morgan Stanley.

His experience includes portfolio management, tax and estate plans and risk management solutions.

He obtained an MBA in Finance and Business Administration from Western New England University.

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Matthew L. Lankford

Wealth Advisor

Matthew Lankford is a financial professional with over 20 years of experience in wealth management. Before joining the Avidian team, Matthew was a financial advisor with RJ Capital, the Wealth Management Division at Merrill Lynch, Managing Partner with TMFS, and an investments specialist at Arrowhead Asset Management. He earned a BBA in Finance from Texas State University.

Matthew is driven to provide his clients with a sense of calm by helping them navigate their financial affairs. He understands that each family has different priorities, and he tailors his financial planning strategies accordingly. Matthew takes a hands-on approach, working closely with his clients to create a personalized plan that is tailored to their specific needs and goals. By doing so, he aims to make a positive difference in their lives and alleviate any financial stress they may be experiencing.

Throughout his career, Matthew has guided his clients through many economic fluctuations, including the dot-com bubble, the financial crisis of 2008, and the recent COVID pandemic. Despite these challenges, he has remained steadfast in his approach and has enabled his clients to achieve their financial objectives in the long term. With an eye on the future, Matthew eagerly anticipates continuing to collaborate with his clients over the years to come and serving as a vital contributor to their financial accomplishments.

In his free time, Matthew engages with his local church community, participates in various charitable organizations, and enjoys coaching youth sports. Matthew and his family call Houston home, where they happily reside together.

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Taylor Motsinger

Wealth Management Associate

Taylor joined Avidian in January of 2023. Before her time at Avidian, she was the director of business development at RJ Capital, handling client requests and firm operations.

Taylor graduated from Florida State University in 2018 with a bachelor's degree in Psychology and Entrepreneurship. She was a part of the first graduating class of the Jim Moran College of Entrepreneurship at Florida State. In 2022, Taylor earned her Series 65 license and became an Investment Advisor Representative.

Taylor enjoys volunteering with the Houston Livestock Show and Rodeo in her free time.

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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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