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

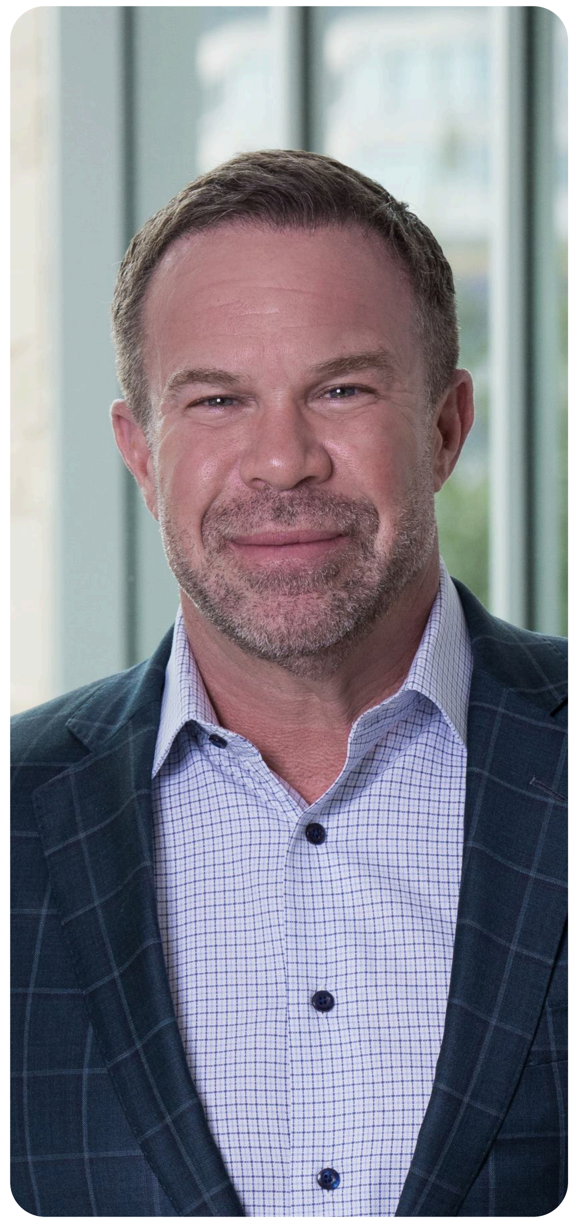
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Gregory J. Litts

Partner, Sr. Wealth Advisor

Gregory J. Litts has extensive experience in the financial markets as his past positions have allowed him to manage the creation of a merchant bank's hedge fund and principally trade stocks and bonds.

Before joining Avidian Wealth Solutions, he founded RJ Capital Investment Advisors, which served Houston families for over 22 years. Before RJ Capital, Greg was a Vice-President of the OTC/ NASDAQ trading desk at Morgan Keegan.

He has a Bachelor of Business Administration from the University of Texas at Austin and a Master of Business Administration in Finance from the University of Houston. Greg currently lives in the Memorial area in Houston with his wife, Susan, and their two children.

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(713) 523-1884

Thomas L. Brown

Wealth Advisor

Thomas joins Avidian Wealth Solutions with over a decade of helping people navigate complex financial planning questions and investment markets. With a deep focus on coordinating the liquidation of retirement plans and the timing of Social Security, Thomas enjoys helping people create sustainable retirement income strategies. Thomas attended the University of Houston and holds a Bachelor's Degree in Communication from the Jack J. Valenti School of Communication.

Prior to joining Avidian, Thomas held the role of Investment Advisor Representative at RJ Capital Investment Advisors.

Thomas and his wife Misty live in Richmond with their two sons. Thomas is active in his church where he serves and teaches.

thomasbrown@avdianwealth.com

(713) 568-9780

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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