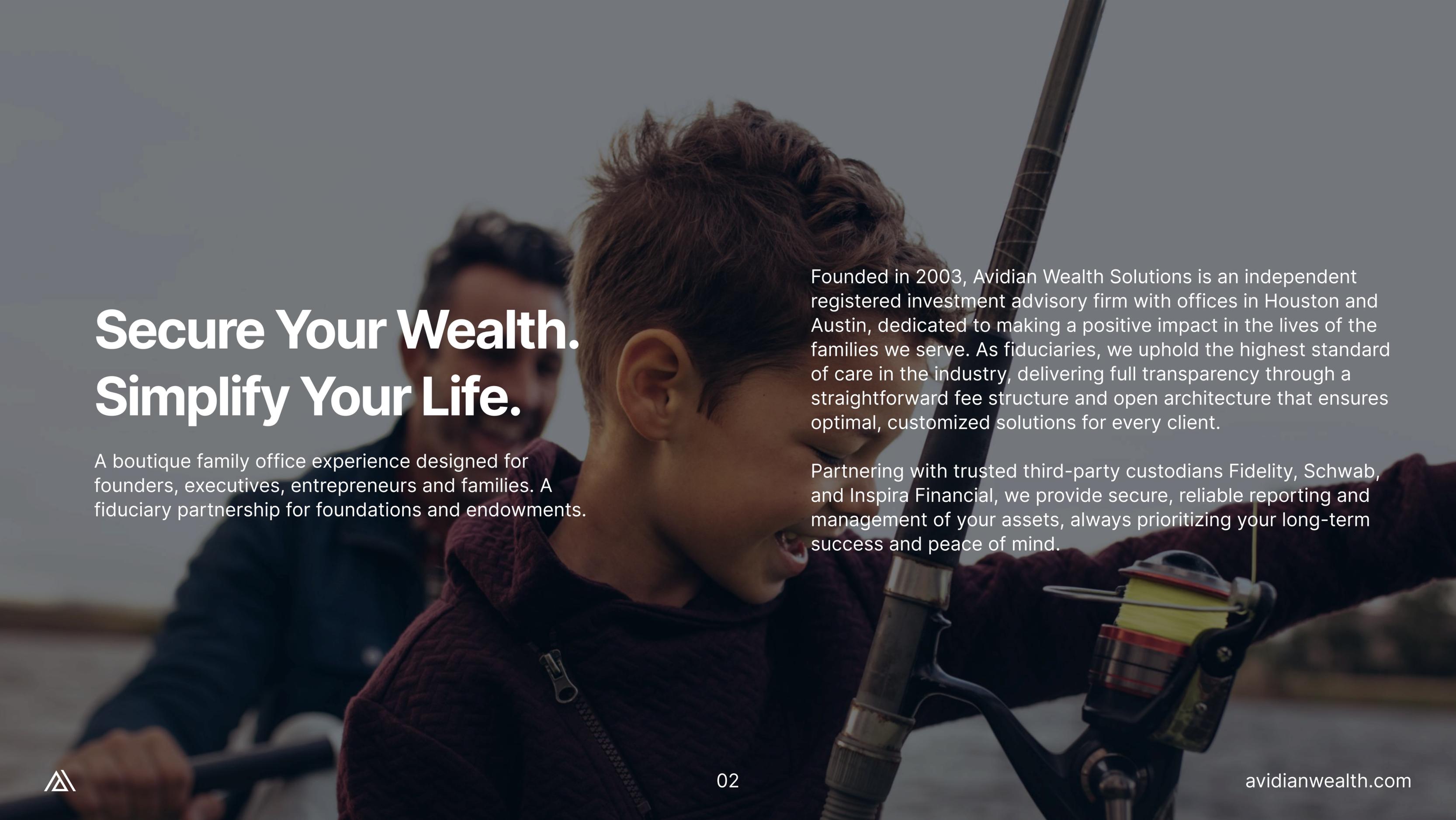


 **AVIDIAN**
WEALTH SOLUTIONS



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



Travis Oglesby

Sr. Wealth Advisor

Travis Oglesby is an industry veteran who began his career in financial services after graduating from Truman State University in 1999 with a bachelor's degree in finance. He later continued his education to receive an MBA from Rockhurst University.

Travis adeptly leverages the intellectual capital offered by the Avidian Wealth Solutions Family Office environment. Travis' clients all receive carefully coordinated, strategic, and tactical access to an in-house team of credentialed Financial Planners, attorneys, tax professionals, investments analysts, and insurance professionals who are equally passionate about working together to address all aspects of their financial well-being.

Before joining Avidian Wealth Solutions, Travis spent 19 years with Ivy Distributors, with the last 12 years as Regional Vice President of South/Central Texas. As Regional VP, Mr. Oglesby taught financial advisers market forecasts, risk management, investment selection, and client servicing techniques.

Travis and his wife, Rucia, have been married since 2015 and have two children, Finn and Piper.

 travisoglesby@avidianwealth.com

 (281) 822-8829



David Gonzalez

Sr. Wealth Advisor

David joined Avidian Wealth Solutions with over a decade of financial planning and investment advice experience. During that time, he has helped families and individuals navigate financial markets to achieve their short and long term goals. Through a disciplined process of listening and understanding each client's unique goals and objectives, David utilizes the extensive resources available at Avidian Wealth Solutions to create an achievable and proactive financial strategy.

Throughout his career, David carries a passion for sharing his understanding of financial markets and assisting clients with making smart decisions in managing their wealth. David attended the University of Houston and holds a Bachelors Degree in Finance from the C.T. Bauer College of Business.

Prior to joining Avidian, David held the role of a JP Morgan Private Client Advisor providing investment solutions and planning advice for Chase Private Clients.

David and his wife Natalie reside in Rice Military and enjoy spending time with family, traveling, and serving their community.

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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

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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