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	56	23
In client assets under management*	Financial professionals	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

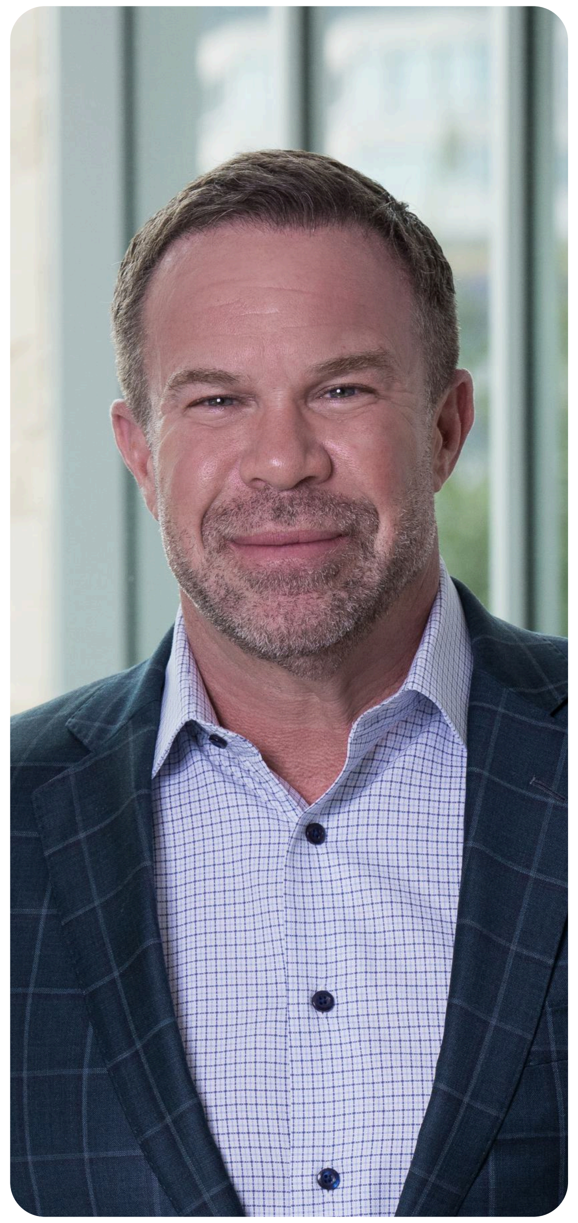
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Joshua W. Patterson

CFP®
Sr. Wealth Advisor

Josh Patterson has been working in the financial services industry since 1998. In 2018, Josh joined Avidian Wealth Solutions as a Senior Wealth Advisor. Prior to joining Avidian, Josh was a founding partner of an independent wealth management firm, where his primary focus was on new business development, investment management, maintaining client relationships and serving the financial planning needs of the firm's clients. Prior to founding his wealth management firm, in 2002, Josh worked as an Associate Vice President with Morgan Stanley Financial Services where he focused on new business development. Josh began his career in 1998 with UBS Financial Services.

Josh attended Texas Lutheran University where he earned a Bachelor of Science – Double Major in Mathematics and Economics, 1998, and spent one semester in Washington DC studying economic policy while attending American University.

Currently, Josh is a CERTIFIED FINANCIAL PLANNER® practitioner (CFP®).

Josh is actively involved within the Financial Planning Association, Houston Chapter, to enhance the scope and efficiency of the financial planning process for clients. Josh is actively involved at his local church where he and his wife lead a weekly bible study class. He also enjoys coaching his children's various sports' teams. Josh and his wife Nisha have been married since 2000 and have three children, Logan Andie and Eli

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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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