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

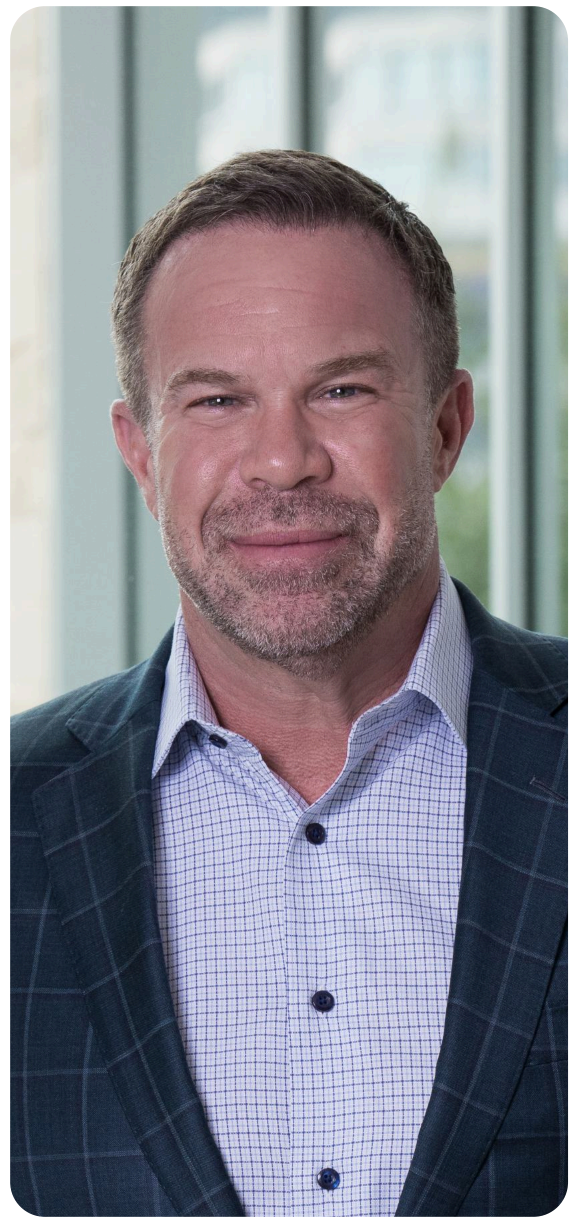
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Luke Patterson

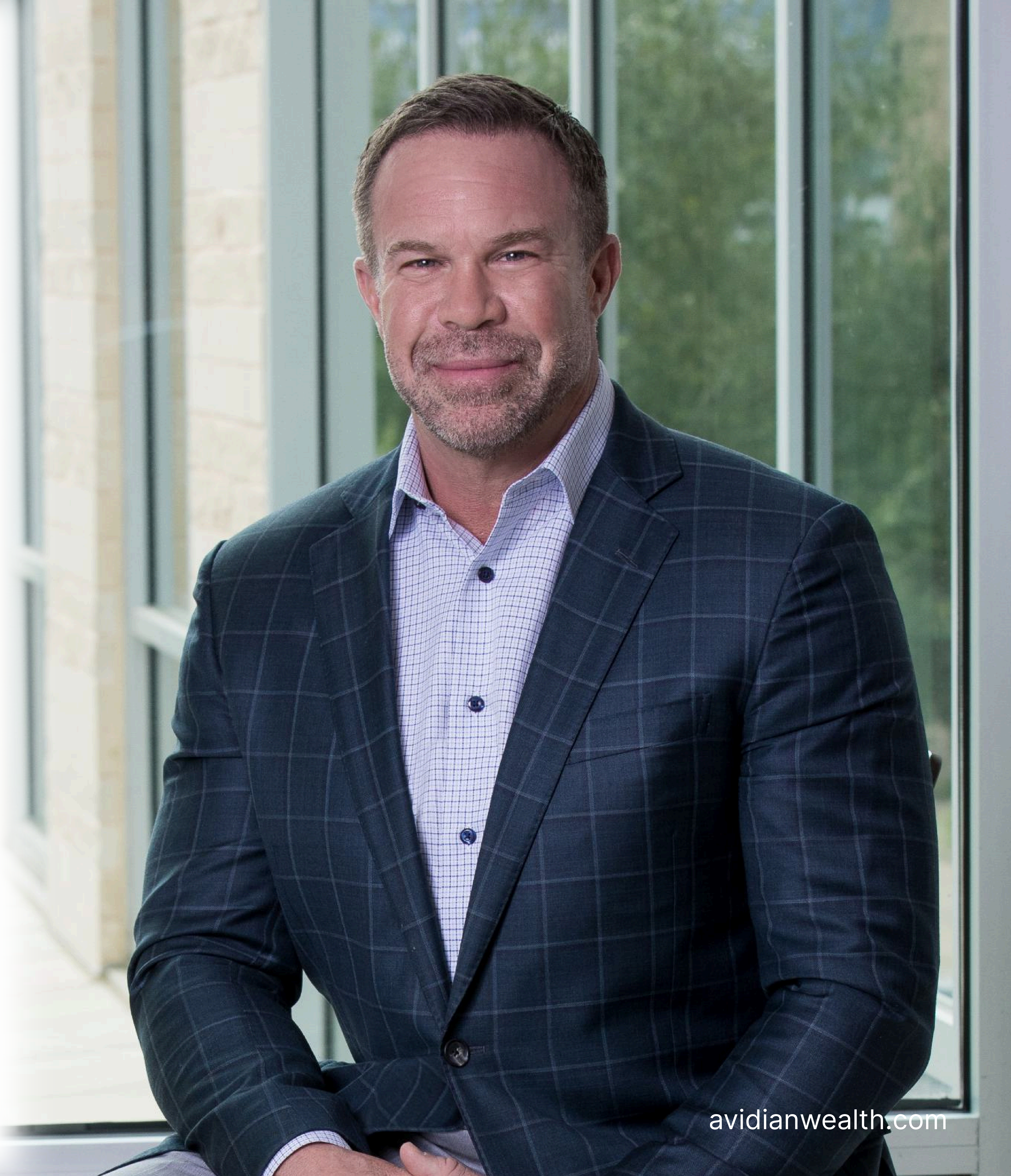
Chairman, CEO

Luke Patterson is the Chairman and CEO of Avidian Wealth Solutions, a multi-family office with over $4.5B in assets under management. Luke has led Avidian Wealth Solutions' vision to reinvent the wealth management experience and promotes expanded access to an ecosystem of ideas, solutions, and talent. Luke is passionate about providing comprehensive wealth management services to ultra-high-net-worth families and business owners, including financial planning, estate planning, tax strategies, investment management, and risk management.

In addition to leading Avidian, Luke leads a financial advisory team that serves the unique needs of ultra-high-net-worth families and business owners. His team specializes in transitioning business owners on how to sell or transition their business by maximizing value and successfully transitioning the business to optimize personal and financial goals. Luke's team enjoys working closely with teams of advisors during the planning process, helping to bring forward the complex and inseparable relationship between an entrepreneur's life, business, and finances.

Prior to joining Avidian in 2009, Luke worked at Merrill Lynch, Morgan Stanley and Morgan Keegan & Co. in their private client groups. A native of Houston, Luke graduated from Rice University with an M.B.A. in Finance and from Sam Houston State University with a Bachelor's Degree in Business. Luke holds a CEPA (Certified Exit Planning Advisor) designation from the Exit Planning Institute. Luke is the host of the upcoming podcast The Journey: Lessons of an Entrepreneur and contributes commentary to the firm's website.

lukepatterson@avdianwealth.com



Michael Zdenek

CFP®
Wealth Advisor

Michael Zdenek joined Avidian Wealth in 2021. Michael serves as an Associate Wealth Advisor. Michael works directly with clients to develop financial plans and formulate client strategies in support of our goal to make a positive impact in their lives.

Michael attended Texas A&M University where he graduated with a bachelor's degree in Economics. Michael received his CFP® (CERTIFIED FINANCIAL PLANNER®) designation in July of 2022.

When not assisting his clients, Michael enjoys spending time outdoors with his wife and children. Michael is a member of Houston's First Baptist Church where he and his wife volunteer as greeters for the evening service.

Before joining Avidian Wealth, Michael served as a Private Client Advisor at J.P. Morgan Chase & Co where he provided financial and investment advice to affluent clients.

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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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