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

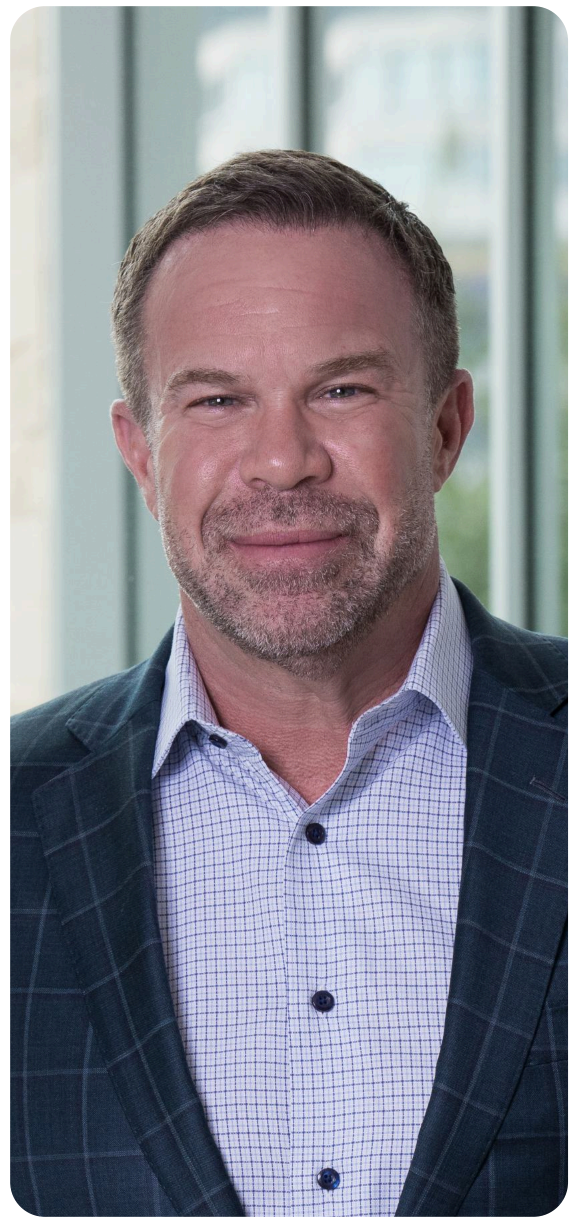
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Christopher Roberts

Wealth Advisor

Christopher began his career with Avidian Wealth Solutions in the Fall of 2017, shortly after graduating from Hendrix College in Conway, Arkansas, with a bachelor's degree in economics.

His first role with the firm mainly focused on assisting new advisors and their clients with transitioning into The Avidian Way. Shortly thereafter, Christopher joined Avidian's President/Founder, Michael Smith's practice as an administrative assistant, where he interfaced with clients regularly and extensively grew his financial planning knowledge.

In 2020, Christopher moved into his current Wealth Advisor role, primarily assisting Michael Smith and Brad Covey with complex financial planning and investment management objectives while ensuring their clients receive the best experience possible. Outside of work, Christopher's hobbies include following almost any kind of sport, taking care of his pets, playing guitar, and finding new adventures with his wife, Elizabeth.

chrisroberts@avdianwealth.com

(281) 822-8837

Gan Li

Wealth Management Associate

Gan Li joined Avidian in February 2022 as a Wealth Management Associate. His responsibilities include new account openings, account funding, cashiering, and client account maintenance for two of our Advisors. Prior to joining Avidian Wealth, he served as a Client Service Associate for a boutique Registered Investment Advisory firm. Li also has four years of experience in the banking sector where he actively built and maintained client relationships.

Gan passed the Security Industry Essentials exam and the Series 65 exam. Gan graduated from West Texas A&M with his Bachelor's of Business Administration in Accounting. Gan received his Master's degree in Finance from the University of Houston-Clear Lake.

Gan enjoys reading books and traveling to different parts of the world with his fiancee. He also enjoys meditation to help with focus and practicing mental wellness.

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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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