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

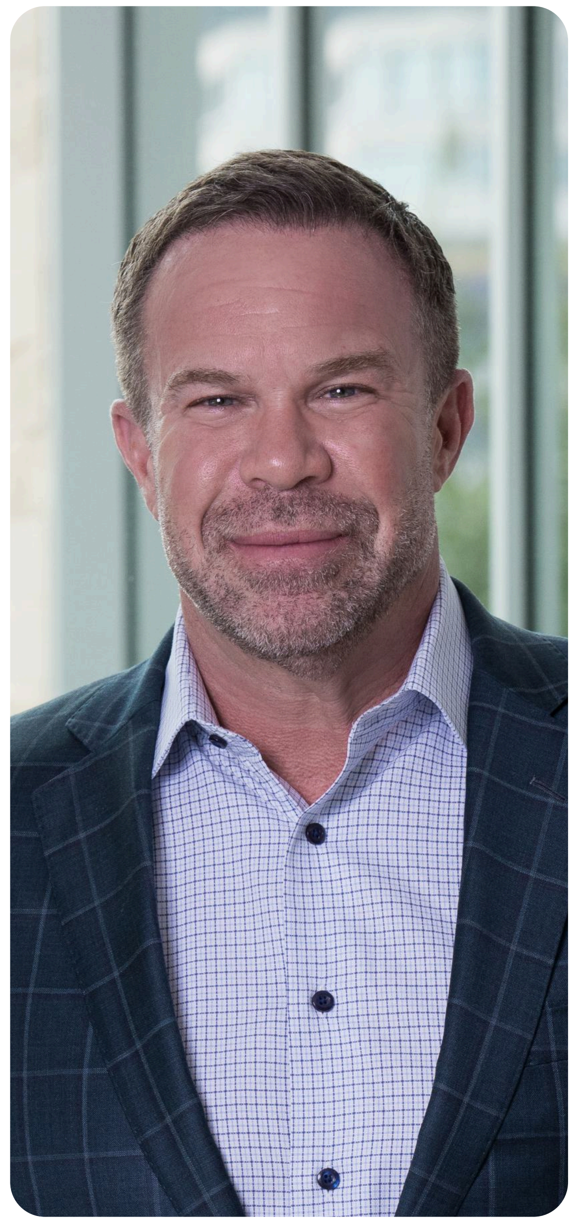
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Preston Snow

CFP®
Managing Partner, Sr. Wealth Advisor

Preston Snow is a CERTIFIED FINANCIAL PLANNER® at Avidian Wealth Solutions. A CFP® since 2009, Preston serves his clients by offering comprehensive financial planning through a systematic approach that includes retirement preparedness assessment and income planning, financial modeling, cash flow analysis, risk assessment/management, and more.

With a passion for helping clients live a less stressful life, Preston strives to make a positive difference in the lives of the families he serves by assisting them in getting their financial affairs in order. He offers customized financial planning services tailored to the unique goals of each entrusted family. Through a disciplined process-driven approach, he prioritizes providing value to his clients' time while establishing and implementing a financial game plan.

Prior to joining the Avidian Wealth Solutions team, Preston provided financial planning services to high net worth individuals and families as a Private Client Advisor at JPMorgan Chase from 2004-2018. He is a graduate of Texas A&M University with a bachelors degree in Agricultural Economics.

Preston and his wife have two sons and he enjoys traveling with his family, fishing, and coaching youth sports

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(832) 675-9858

Ben LeBoeuf

CRPC™
Wealth Advisor

Ben LeBoeuf is a Chartered Retirement Planning Counselor℠ (CRPC™) at Avidian Wealth Solutions. As a CRPC™ professional, Ben serves clients by providing comprehensive wealth management services that include retirement planning, investment strategy, risk management, and financial goal setting through a disciplined, process-driven approach.

Before joining Avidian Wealth Solutions in March 2025, Ben worked as a Wealth Management Associate at Concenture Wealth Management, where he contributed to several client-focused initiatives and gained valuable experience in portfolio analysis and financial planning. Ben holds a bachelor's degree in accounting from Nicholls State University.

Ben's passion for financial planning stems from his desire to help individuals and families navigate life's complexities with confidence. He is committed to building long-term relationships with his clients by delivering personalized strategies tailored to their unique needs and aspirations.

In his personal time, Ben enjoys playing soccer and volleyball, skiing, and traveling to new places. He is also actively involved in his church's young adult organization.

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Kim Ton

Wealth Management Associate

Kim serves as a Wealth Management Associate with Avidian Wealth Solutions.

Prior to joining Avidian, she worked with JPMorgan Chase as a banker and then advisor associate assisting clients with their financial needs.

She has a degree from Houston Baptist University and is a long time Sugar Land resident.

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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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