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

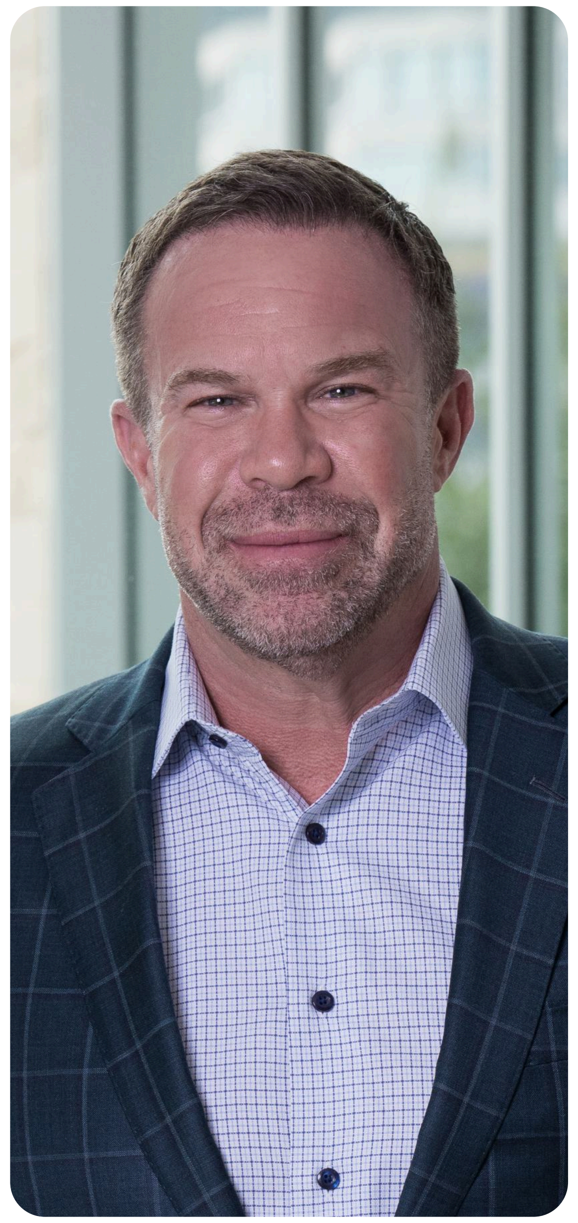
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Morgan Stone

CFP®, CEPA©, MBA
Partner, Sr. Wealth Advisor,

Morgan is a CERTIFIED FINANCIAL PLANNER® with over twenty years' experience in the financial services industry. He is passionate about collaborating with his clients so they may achieve their unique life goals with confidence and clarity. His clients include high net worth families, business owners and corporate executives at or near retirement. He takes pride in helping his clients make wise investment and planning choices by leveraging the extensive resources available at Avidian.

Morgan graduated from Vanderbilt University and earned an MBA with a Personal Financial Planning concentration from St. Edward's University. Through the Exit Planning Institute, he also earned the Certified Exit Planning Advisor, CEPA®, designation to consult with business owners on planning their transition out of their companies in a thoughtful, deliberate and rewarding manner.

Prior to joining Avidian, Morgan was the founder and president of Stone Wealth Management, Inc., a Registered Investment Advisor firm in Austin. He also previously served as Vice President of Austin Trust Company. Morgan is a member of the Financial Planning Association and the Estate Planning Council of Central Texas. He previously served on the Board of Directors of the Estate Planning Council of Central Texas, the Board of Directors of the Juvenile Diabetes Research Foundation, and the Stephen F. Austin High School Continuing Education Foundation.

Morgan is a native Austinite, and the proud father of Will and Katherine. When not with his family, Morgan enjoys tennis, mountain biking and the live music scene in Austin. He also tries to work in a fly-fishing excursion or two each year, after working as a fly-fishing guide upon graduating from college.

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Antonio Tovar

CFP®
Wealth Advisor

Antonio is a CERTIFIED FINANCIAL PLANNER® practitioner and is developing a specialization in working with executives and professionals who receive equity compensation and other employer benefits. His primary responsibilities involve meeting with clients, supporting other advisors in financial planning projects, and researching different areas of interest that are impactful to creating a financial plan. Antonio is a Financial Planning Association (FPA) member and the Young Men's Business League (YMBL) member.

Antonio is a graduate of Texas Tech University with a bachelor's degree in Personal Financial Planning. He started his financial career as a broker, facilitating trades and assisting with client account support. Antonio has been featured or quoted in Business Insider, Yahoo! Finance, Financial Advisor Magazine, and GOBankingRates. Most recently, he was extensively quoted in an article in Sound Dollar discussing how to roll over a 401(k) into an IRA. In addition, he was interviewed on NTD Television on how to get out of debt.

As a native Austinite, Antonio spends much of his time with family and friends in his hometown. He enjoys activities such as golf, hiking, biking, or playing his guitar. One thing he loves about home is the vibrant color of the surrounding Austin area.

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Patricia Espino

Wealth Management Associate

Patricia is a first-generation college graduate with a Master of Science in Personal Financial Planning from Texas Tech University. While in college, she worked in corporate banking, where she realized there had to be more guidance for people to establish and reach their financial goals. Her passion for this industry comes from the direct impact a financial plan could have on someone's financial future.

As a West Texas native, she recently relocated back to Texas from Tucson, Arizona, where she worked with a non-profit that provided financial literacy and financial mentors at no cost to the participants. Patricia had the opportunity to gain experience and various skills at this newly growing startup, ranging from customer service, coordination, mentoring, marketing, and tech support.

When not at work, Patricia will be spending time with her dog, hiking, crafting, baking, volunteering, and exploring all that the city of Austin and its surrounding areas have to offer.

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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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