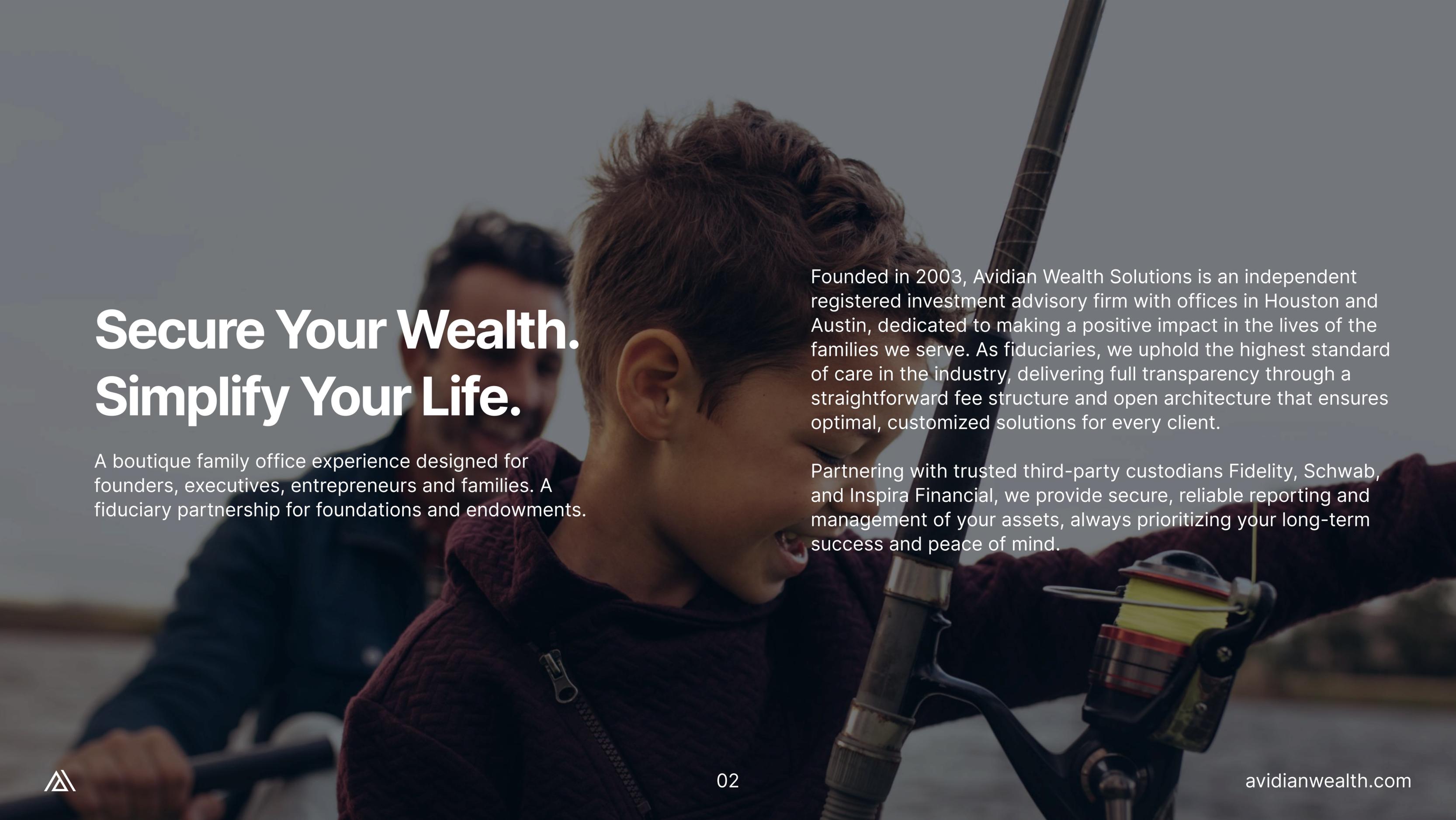


 **AVIDIAN**  
WEALTH SOLUTIONS



# 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](http://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



# Laura B. Vollrath

CFP®

Wealth Advisor

Laura Vollrath has over 20 years of experience working with clients and advisors in the financial industry. Laura joined Equistar Wealth Management in 2018 as a paraplanner and was, due to her commitment to the firm and its clients, promoted to Wealth Advisor in March of 2023.

Before joining Equistar in 2018, Laura had many years of experience as Chief Compliance Officer and Operations Manager with another advisory firm. Laura holds a Series 65 license and is a CERTIFIED FINANCIAL PLANNER®. She looks forward to guiding clients with their money matters, personal finances, and investments.

Laura and her family had spent the previous 20 years living in Champaign, IL, where she earned a Bachelor of Science degree from the University of Illinois Urbana-Champaign. They relocated to Texas in 2018 so her husband, Jim, could pursue a career opportunity at Texas State University. Laura now resides in Dripping Springs with her husband and their three kids.

 [lauravollrath@avidianwealth.com](mailto:lauravollrath@avidianwealth.com)

 (512) 493-9745



# 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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