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

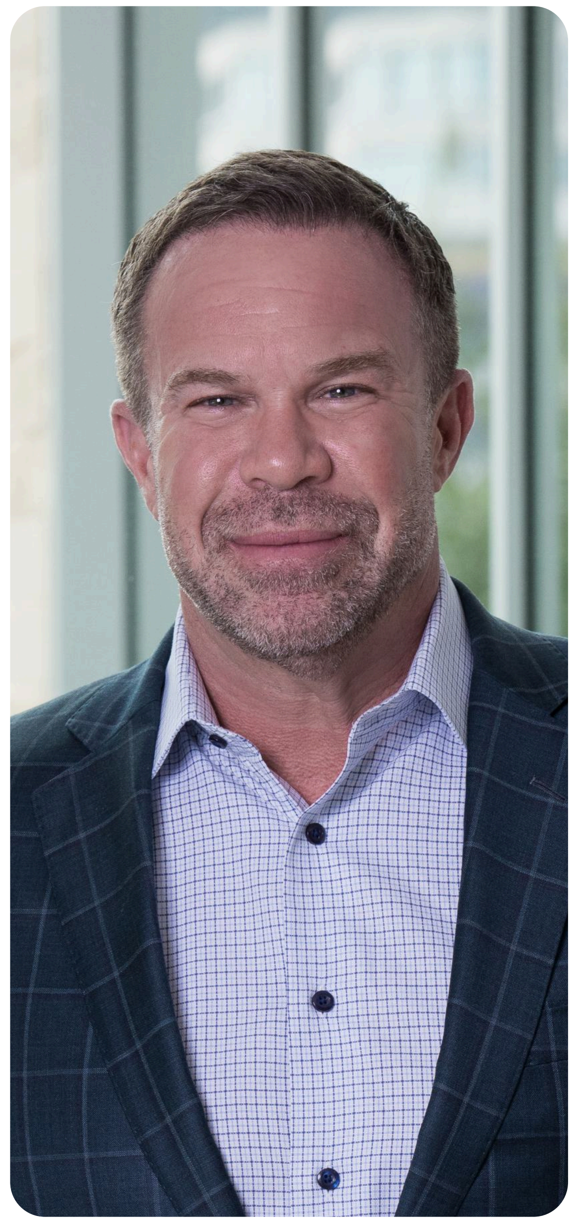
Providing a suite of wealth planning solutions throughout your financial life, all included with your advisory fee.

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

Chris Russell

Partner*, Sr. Wealth Advisor, CAP

Chris Russell is a Partner* and Senior Wealth Advisor at Avidian Wealth Solutions with 20 years of experience in wealth management.

Before joining Avidian, Chris served on the Business Development Committee at Linscomb Wealth, where he helped guide high-net-worth clients toward their financial goals through personalized, comprehensive strategies. He has been honored as the Professional Advisor of the Year by the Community Foundation of Greater Huntsville. As well as receiving professional recognition from the Community Foundation of Greater Huntsville for his service to the community.

Chris graduated from Auburn University with a B.S. in Business Administration.   He is also a founding Board Chair of the Community Foundation of Greater Huntsville and a past Board Chair of Leadership Huntsville, where he received the Distinguished Service Award from the National Association of Leadership Programs.

Outside of the office, Chris and his wife enjoy traveling, visiting at least one new country every year. He also plays tennis several times a week and enjoys spending his weekends with family and friends.

chrisrussell@avidianwealth.com

(256) 555-5555

Sheri Robinson

Partner*, Sr. Wealth Advisor, CFP®, AEP, CPA (Retired)

Sheri Robinson is a Partner* and Senior Wealth Advisor at Avidian Wealth Solutions, working with high-net-worth clients on comprehensive financial and estate planning matters.

Before joining Avidian, Sheri served as a Senior Wealth Advisor and Team Lead at Linscomb Wealth.

Sheri graduated from the University of Alabama at Birmingham with a B.S. in Accounting. She is a member of the Financial Planning Association, and has held various national leadership positions, including past President of the North Alabama Chapter of the FPA. Sheri is also a member of the National Association of Estate Planners and Councils, the Alabama Society of Certified Public Accountants, and the Estate Planning Council of Birmingham. Additionally, Sheri serves on the Board of the University of Alabama at Birmingham National Alumni Society.

Outside of the office, Sheri has many hobbies and interests, including singing in a community choir, playing pickleball, growing vegetables in a home garden and experimenting with new recipes, reading, and collecting art, especially from Alabama artists. Sheri also enjoys traveling with family and friends, exploring new cities, attending the theater, visiting museums, and indulging in fine dining.

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(205) 555-5555

Maddie Cerda

Sr. Wealth Management Associate

Maddie first joined Avidian Wealth in June 2020, bringing strong client-service experience from her previous role as a Client Service Assistant, where she supported meeting preparation, strengthened operational processes, and handled a wide range of client requests.

A graduate of Texas Tech University with a bachelor's degree in Personal Financial Planning, Maddie has always had a passion for helping clients feel confident and supported in their financial lives. She contributed meaningfully to Avidian's client experience through advisor support, daily operational oversight, and preparation of essential meeting documentation.

In 2023, Maddie pursued an opportunity outside the firm that allowed her to broaden her professional experience. We are thrilled that she has returned to Avidian as a Sr. Wealth Management Associate, continuing the work she cares deeply about and bringing an even stronger perspective to the team.

Outside of work, Maddie and her husband enjoy traveling, exploring new restaurants and coffee shops around Houston, and spending time with their two children.

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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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