

 **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.



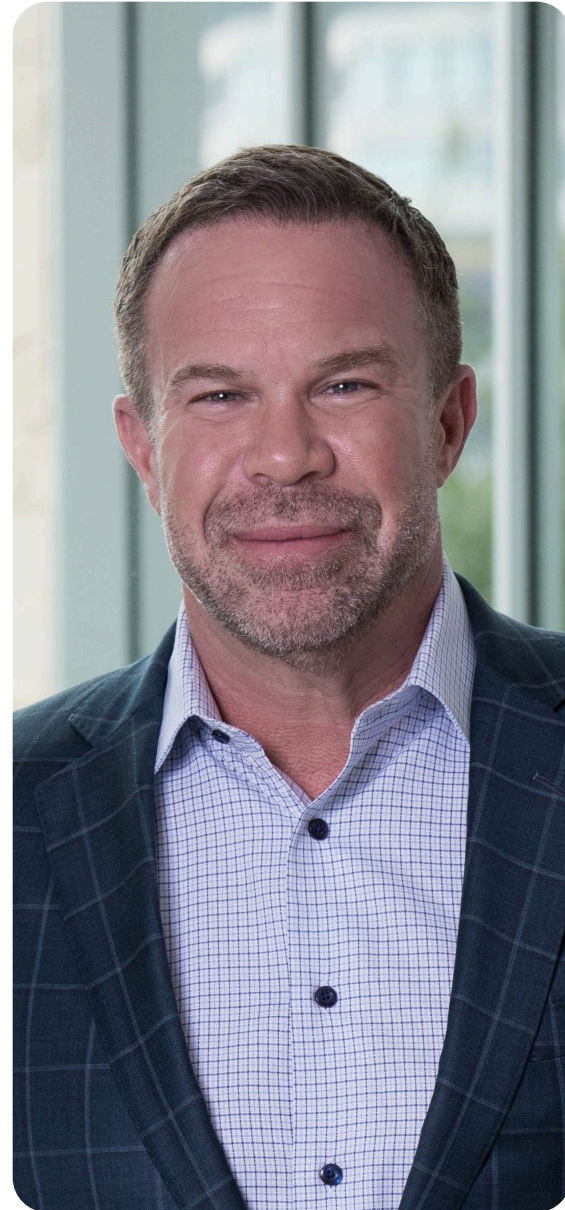
At Avidian Wealth Solutions, we take a holistic, fiduciary-first approach to safeguarding and growing your legacy. Our experienced multidisciplinary team delivers personalized strategies that integrate investment management, financial planning, estate preservation, tax optimization, and risk mitigation, 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



# Reid Guthrie

Partner\*, Sr. Wealth Advisor, CFP®

Reid Guthrie is a CERTIFIED FINANCIAL PLANNER® and has more than a decade of experience helping families organize, grow, and protect their wealth so they can focus on what matters most. He provides a family office-style experience by integrating investment management, tax planning, legal coordination, and long-term financial strategy into one cohesive plan. His philosophy is that financial advice should go beyond portfolios and spreadsheets to provide clarity, confidence, and a clear path toward the life clients want to build.

He works with families, business owners, and professionals to develop strategies aligned with their values and long-term goals—whether planning for retirement, navigating major life milestones, managing risk, or building generational wealth. Reid aims to serve as a trusted partner, helping coordinate the many moving parts of a client's financial life.

Outside of work, Reid enjoys spending time with his wife, Kaci, and their children, Vivienne and Bennett. He also enjoys golfing, fishing, staying active, and being involved in his local community.

 reidguthrie@avidianwealth.com

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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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