

# Corporate Keynotes

## Financial Strategy, Leadership & Decision-Making

*Dr. Preston D. Cherry, CFP®, Ph.D. | Concurrent Wealth Management*

**Dr. Preston D. Cherry, CFP®, Ph.D.** | Founder, Concurrent Wealth Management | Creator, Financial Harmony™

Dr. Preston Cherry is a Ph.D., CFP®, and Certified Financial Therapist™ who works at the intersection of financial strategy, behavioral finance, and leadership decision-making. He is the creator of Financial Harmony™, the Humanity of Money™, and Return on Alignment™ (ROA), proprietary frameworks that bring intellectual rigor and lived experience to every executive room he enters.

He is a Top 10 Investopedia 100 Financial Advisor, 2025 FPA Heart of Financial Planning Award recipient, and author of *Wealth in the Key of Life: Finding Your Financial Harmony*.

## Financial Decision-Making Under Complexity

Senior leaders are required to make high-stakes financial and strategic decisions in environments defined by uncertainty, competing priorities, and rapid change. The problem is rarely a lack of information. It is the gap between data and decision, shaped by human behavior, incentives, cognitive bias, and the invisible weight of organizational identity.

This keynote helps executives and board-level leaders understand how financial outcomes are shaped not only by strategy and analysis, but by the behavioral and psychological forces most frameworks never account for. Leaders leave with practical tools for navigating complexity, reducing decision fatigue, and leading with clarity when the path forward is not obvious.

### Key Takeaways

- A framework for separating signal from noise in high-stakes financial decisions
- Recognition of the behavioral forces, incentives, identity, and cognitive bias, that shape executive judgment
- Practical strategies for leading with financial clarity under uncertainty
- The distinction between optimization and maximization, and why chasing every edge often undermines long-term outcomes

# The Psychology of Capital: How Leaders Think, Decide, and Lead With Money

Capital decisions are rarely neutral. They are shaped by identity, emotion, incentives, and lived experience long before they reach the spreadsheet. This session explores how leaders across financial services, PE-backed firms, and family offices can better recognize the psychological forces influencing capital allocation, risk-taking, and leadership judgment.

Attendees leave with sharper self-awareness of how money decisions are made at the top, and with a practical vocabulary for leading more effectively with capital responsibility across cycles, transitions, and moments of organizational complexity.

## Key Takeaways

- How identity and emotion shape capital decisions at the leadership level
- Behavioral patterns that create blind spots in risk assessment and long-term planning
- Frameworks for more intentional, aligned capital allocation
- How to build a leadership culture where financial decisions are made with clarity, not just confidence

## From Growth to Governance: Leading Through Financial Transition

As organizations scale, the financial and leadership decisions that built the business often stop working. The strategies, incentives, and decision-making models that drove early growth create misalignment at the governance stage. This talk is designed for founder-led, PE-backed, and scaling organizations navigating growth, transition, or succession.

Dr. Cherry examines how governance, incentives, and decision-making must evolve as complexity increases, helping leaders move from reactive choices to intentional, durable strategies that align organizational values with long-term financial direction.

### Key Takeaways

- A framework for recognizing when growth-stage decisions become governance-stage liabilities
- How incentive structures and decision psychology shift across organizational phases
- Tools for navigating succession, transition, and financial complexity without losing alignment
- The Return on Alignment™ (ROA) lens applied to organizational strategy

## Wealth, Leadership, and Alignment: Making Decisions That Last

Short-term success does not always lead to long-term impact. Many senior leaders find themselves financially successful and organizationally effective, yet quietly misaligned. The decisions that look right on paper create friction in practice because the strategy was never connected to what the leader or organization actually values.

This session connects financial strategy, leadership responsibility, and organizational values to help senior leaders make decisions that endure. Ideal for executive retreats, leadership offsites, and board-level programs, this talk addresses wealth, leadership, and purpose with intellectual rigor, without motivational clichés.

### Key Takeaways

- A practical framework for aligning financial strategy with organizational identity and leadership values
- The Humanity of Money™ applied to organizational decision-making
- How to build durable strategies that hold across transitions, market cycles, and leadership changes
- A language for connecting wealth, leadership, and well-being without oversimplification

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### Formats Available

- Keynote presentation: 45 to 75 minutes
- Executive fireside chat or moderated conversation
- Board or leadership offsite session
- Virtual and in-person delivery available

### Ideal Audiences

- C-suite executives, boards of directors, and founder-led leadership teams
- PE-backed portfolio company leadership
- Family offices and UHNW principals
- Financial services leadership and investment management firms
- Global leadership summits and executive conferences

### Speaking Inquiries

[www.drprestoncherry.com/speaking](http://www.drprestoncherry.com/speaking)