Executive Financial Strategy Sessions

For Senior Leaders and High-Impact Professionals

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

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

Senior leaders and high-impact professionals often operate within complex compensation structures, performance bonuses, long-term incentives, equity awards, deferred compensation, and tax exposure tied to career progression. At the same time, many executives and long-tenured professionals are navigating critical decisions without a clear framework for connecting financial decisions to life priorities.

These Executive Financial Strategy Sessions are designed to provide clarity, structure, and decision confidence for both executive leaders and high-impact professionals within the organization. Led by Dr. Preston Cherry, CFP®, Ph.D., Houston-based flat-fee fiduciary and creator of Financial Harmony™, each session blends technical planning insight with real-world executive experience.

Session Focus Areas

Sessions are tailored to the audience and may include:

- Understanding RSUs, PSUs, bonuses, and long-term incentives
- Tax-aware planning around equity vesting and payouts
- Retirement timing and transition planning for Gen X leaders
- Aligning financial decisions with personal values and life goals
- Reducing decision fatigue during periods of change or career transition
- Equity compensation strategy and concentration risk
- Retirement durability modeling and high-income year planning

Sessions are educational in nature and designed to empower leaders with clarity, not product recommendations.

Engagement Options

Option 1: ERG-Sponsored Executive Session

Ideal for ERGs, leadership development groups, or Financial Literacy Month programming.

- 60 to 90 minute live session (in-person or virtual)
- Interactive presentation with Q&A
- Focused on leadership-level financial clarity and alignment
- Includes copies of Wealth in the Key of Life: Finding Your Financial Harmony for participants

Investment: $2,000 book purchase (covers session facilitation and materials)
Travel and lodging apply for in-person sessions.

Option 2: Leadership Financial Strategy Session (HR-Sponsored)

Designed for organizations seeking deeper executive-level engagement.

- 90-minute customized session
- Pre-session alignment with HR / Total Rewards
- Equity compensation strategy (RSUs, PSUs, LTIPs)
- Tax timing during peak income years
- Retirement durability modeling
- Decision-making clarity during transition periods
- Interactive Q&A
- Post-session executive resource summary

Investment: $10,000 facilitation fee
Appropriate for VP+, executive cohorts, or leadership teams. Travel and lodging apply for in-person delivery.

Option 3: Professional Financial Strategy Session (High-Impact Cohort)

Designed for senior managers, long-tenured professionals, and high-impact contributors with equity or complex compensation.

- 60 to 75 minute session (in-person or virtual)
- Bonus volatility and tax positioning
- Equity awareness and concentration risk
- Retirement readiness framing
- Financial decision clarity during career progression
- Interactive Q&A

Investment: $5,000 facilitation fee

Appropriate for director-level, senior managers, technical leaders, and equity-compensated professionals. Travel and lodging apply for in-person delivery.

Option 4: Executive Financial Wellness Program (Two-Day Engagement)

For organizations seeking coordinated impact across leadership and professional cohorts.

Day One: Leadership Financial Strategy Session, focused executive cohort session.

Day Two: Professional Financial Strategy Session, high-impact professional cohort session.

Investment: $15,000 program fee. Optional book purchase available.

This program supports compensation clarity, retention, and financial decision confidence across multiple leadership levels. Travel and lodging apply for in-person delivery.

About the Facilitator

Dr. Preston Cherry, CFP®, Ph.D. is the founder of Concurrent Wealth Management and creator of Financial Harmony™. He works directly with high-income professionals navigating equity compensation, tax timing, and retirement durability decisions with clarity and confidence. His approach integrates fiduciary financial planning, behavioral finance insight, and real-world executive experience to help leaders align complex financial decisions with long-term stability and life priorities.

- Ph.D. in Personal Financial Planning
- CERTIFIED FINANCIAL PLANNER™ (CFP®)
- Accredited Financial Counselor® (AFC®)
- Certified Financial Therapist™ (CFT™)
- Top 10 Investopedia 100 Financial Advisor
- 2025 FPA Heart of Financial Planning Award recipient
- Author, Wealth in the Key of Life: Finding Your Financial Harmony

Session Inquiries

www.drprestoncherry.com/speaking | www.concurrentfp.com