

# Industry Sessions

## Financial Services, Wealth Management & Advisory Firms

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

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

These sessions are designed for financial services conferences, advisory firms, wealth management organizations, fintech audiences, and family offices. Dr. Cherry brings his clinical credentials, proprietary frameworks, and active practice to sessions that go beyond general theory, delivering tools advisors and wealth professionals can use immediately.

## Prompt Like a Human, Grow Like a Machine: Scaling Advice with Soulful AI

AI is not the future of advice. Human-centered AI is. Dr. Cherry shares a clear, practical blueprint for embedding your values, voice, and philosophy into AI systems, so your practice scales without losing what makes it yours.

This is not about prompt engineering or ChatGPT shortcuts. It is about prompt embodiment: teaching AI to think, communicate, and serve the way you do. Through live, on-stage examples from his own advisory practice at Concurrent Wealth Management, Dr. Cherry demonstrates how the most powerful skill in the age of AI is still deeply human judgment, and how to use it to turn AI into a trusted teammate that reflects your identity, your clients, and your Financial Harmony™ philosophy at scale.

### Key Takeaways

- The 3 Ingredients of a High-Impact Prompt: Voice, Values, Vision
- How to embed your planning philosophy into AI systems without losing authenticity
- Live demonstration of human-centered prompting vs. generic content generation
- How AI can scale trust, not just tasks, across onboarding, IPS creation, tax planning, and client communication
- Why prompting with empathy, values, and identity is relationship amplification, not content automation

# Spending Smarter, Living Better: From Guilt to Growth

*Non-conference professional development session, scalable for firms, study groups, and professional associations*

Most financial professionals understand the mechanics of spending. Few have the language, frameworks, or psychological tools to transform how clients feel about it.

This session unpacks the hidden emotional forces that drive spending behavior, guilt, fear-based saving, spend shaming, and societal expectations, and introduces a values-based, life-stage-centric framework that advisors can immediately integrate into client conversations. The shift is from restriction to intentionality, from guilt to alignment, from financial education to financial transformation.

## Learning Objectives

1. Identify the psychological and emotional drivers behind client spending behavior, including guilt, fear-based saving, and societal expectations
2. Apply a values-based, life-stage-centric framework to align spending with personal goals and well-being
3. Reframe negative money mindsets using financial psychology techniques that promote financial self-compassion and confidence
4. Implement practical tools to guide clients from guilt-based to growth-oriented spending
5. Enhance client communication by integrating financial psychology principles into the advisory process

## Key Takeaways

- A fresh lens on spending behavior, understanding how guilt, fear, and identity shape financial decisions
- A values-based, life-stage-centric spending framework for immediate client use
- The Five Permissions of Wealth™ applied to spending psychology
- Tools for shifting the advisory conversation from restriction to intentional living

# The Legacy Letter: A Values-Driven Estate Planning Blueprint

Baby Boomers are projected to transfer over \$90 trillion in wealth over the next two decades. Research shows that 64% of inheritances stay with the original advisor when a legacy relationship exists. The opportunity is not just technical. It is deeply human.

This session introduces the Four Keys Framework, Identity, Values, Story, and Well-Being, as the blueprint for every legacy and estate planning conversation. Drawing from *Wealth in the Key of Life: Finding Your Financial Harmony* and Dr. Cherry's own multi-generational family case study, advisors leave with tools that deepen client bonds, surface the stories behind the assets, and differentiate their practice in the great wealth transfer.

Legacy is not just a legal document. It is a narrative. This session teaches advisors how to open the heart, open the mind, and build estate plans that reflect who clients truly are.

## Session Structure

- **Identity and Values.** Anchor who clients are. Uncover core values. Translate into estate goals. Use values-mapping prompts.
- **Story and Well-Being.** Craft family narrative. Use storytelling prompts. Define generational harmony. Shift focus from dollars to legacy.
- **Interactive Workshop.** Draft Legacy Letter using the Four Keys. Apply prompts to real family facts. Spark and share.

## Key Takeaways

- The Four Keys Framework (Identity, Values, Story, Well-Being) as a legacy planning blueprint
  - The Legacy Letter as the human layer of every estate plan
  - Values Questionnaire, Story Capture Worksheet, and Well-Being Dashboard
  - How to position your practice for multi-generational relationships in the \$90T wealth transfer
  - The distinction between legacy as a document and legacy as a doctrine
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### **Formats Available**

- Conference breakout or mainstage session: 45 to 75 minutes
- Firm training and professional development workshop
- Study group and CE-eligible session (available for select formats)
- Virtual and in-person delivery available

### **Ideal Audiences**

- Financial advisors, planners, and wealth management professionals
- Advisory firm leadership and teams seeking human-centered planning frameworks
- Financial services conferences and industry associations
- Family offices and multi-generational wealth management practitioners
- Fintech and financial technology audiences

### **Speaking Inquiries**

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