Energy Financial Strategy Sessions

For Energy 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™

Energy professionals operate within compensation structures that differ from most industries. Bonus volatility, long-term incentives, equity exposure, and tax complexity are often tied directly to commodity cycles, creating financial decisions that require both technical precision and behavioral clarity.

These Energy Financial Strategy Sessions are designed to provide clarity, structure, and decision confidence for both executive leaders and high-impact professionals within the energy sector. Led by Dr. Preston Cherry, CFP®, Ph.D., a Houston-based flat-fee fiduciary with real-world energy-sector experience, each session combines technical planning insight with the Financial Harmony™ framework for aligned financial decision-making.

Session Focus Areas

Sessions are tailored to energy-sector compensation realities and may include:

- Equity vesting and tax timing tied to energy cycles
- Bonus volatility and high-income year planning
- Concentration risk in company equity and sector exposure
- Retirement durability modeling for energy executives
- Career transition decisions, upstream, midstream, downstream, and beyond
- Aligning financial decisions with life priorities during volatile cycles
- Financial clarity for Gen X energy professionals navigating peak earning years

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

Engagement Options

Option 1: ERG or Professional Development Session

For Financial Literacy Month, ERGs, or broader professional audiences within the energy sector.

- 60 to 90 minute facilitated session (in-person or virtual)
- Energy-specific financial clarity themes
- Optional book purchase: Wealth in the Key of Life: Finding Your Financial Harmony
- Interactive Q&A

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

Option 2: Energy Leadership Financial Strategy Session (Executive Cohort)

Designed for senior leadership teams and executive groups within the energy sector.

- 90-minute customized session
- Pre-session alignment with HR / Total Rewards
- Equity compensation strategy (RSUs, PSUs, LTIPs)
- Tax timing during peak income years and commodity cycles
- 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: Energy 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 in commodity-cycle environments
- Equity awareness and concentration risk
- Retirement readiness framing for energy professionals
- Financial decision clarity during career progression or industry transition
- 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: Energy Financial Strategy Program (Two-Day Engagement)

For organizations seeking coordinated impact across leadership and professional cohorts.

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

Day Two: Energy 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 energy, oil & gas, and 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 energy-sector experience, helping leaders align complex financial decisions with long-term stability and life priorities.

- Houston-based, deeply embedded in the energy sector community
- 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

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