

WEALTH IN THE KEY OF LIFE

Finding Your Financial Harmony



A groundbreaking guide to transforming your finances through alignment, purpose, and well-being.



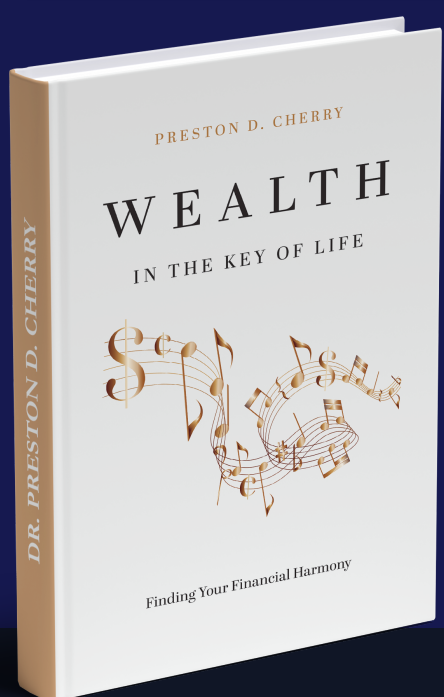
ABOUT THE AUTHOR

Dr. Preston D. Cherry is a CFP[®], financial therapist, award-winning wealth advisor, author, and global financial psychology expert and speaker. He is the founder of **The Financial Harmony™ philosophy and host of **The Financial Harmony Podcast**.**

He is the former Director of the **Center for Financial Wellness** and the Financial Planning Program at the University of Wisconsin–Green Bay, and Past President of the Financial Therapy Association (2022).

Dr. Cherry was named a **2025 FPA Heart of Financial Planning Award winner and a 2023 Investopedia Top 10 Financial Advisor**. He is a contributor to Kiplinger Wealth and has been featured in **Schwab Network TV, Nasdaq Trade Talks, AARP, Yahoo Finance, The New York Times, and more**.

Through his groundbreaking approach, Dr. Cherry helps people align their money, mindset, and meaning—using evidence-based strategies to transform lives and financial outcomes.



ABOUT THE BOOK

In *Wealth in the Key of Life*, Dr. Preston D. Cherry—award-winning wealth advisor, financial therapist, and founder of Concurrent Wealth Management—delivers a transformative framework for aligning your money with your identity, values, and aspirations.

This isn't just another personal finance book. It's a playbook for **Financial Harmony™**—where your money works in concert with your purpose, your values shape your actions, and your finances are used to support both your present well-being and future goals through personalized strategy and planning.

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YOU'LL LEARN

- **Transform your financial decisions** through intentional frameworks that promote better financial wellness outcomes
- **Replace shame and guilt** with clarity and compassion through financial therapy
- **Find your Financial Harmony™** using your wealth to support your well-being—not just in retirement, but right now
- Unlock **The Five Permissions of Wealth™** to build and live guilt-free
- Navigate life transitions with **the Alignment Sequence™**, turning emotional clarity into financial strategy that informs your planning and execution
- Use **the Financial Harmony™** Compass to identify the well-being domains that matter most—so you can assign your dollars with intention, aligned to your current life phase and goals

With life and money alignment, your money has assignments.



We call it 'personal finance' for a reason—it's personal to all of us. Dr. Cherry helps us break down our relationship to money and build a more harmonious, successful one.

Caleb Silver, Editor-in-Chief, Investopedia

WHAT IT'S FOR



High-income professionals, business owners, and entrepreneurs seeking clarity, confidence, and alignment in their finances



HR and wellness leaders focused on boosting employee financial well-being and retention



Anyone navigating transition—career or business shifts, transformative next chapters, or retirement



Those ready to stop chasing money myths and start building purpose-filled wealth, their way