

OIL & GAS KEYNOTES

Executive Wealth, Leadership & Long-Term Prosperity

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™ recognized as one of the leading voices at the intersection of executive wealth, leadership, and the human dimensions of capital. 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, 2024 Texas Tech Distinguished Alumnus, and author of *Wealth in the Key of Life: Finding Your Financial Harmony* (Wiley).

Financial Reality, Interpreted.

Premium keynote presentations for global energy conferences, executive leadership summits, and corporate events that explore executive wealth, leadership, career complexity, and long-term prosperity in one of the world's most dynamic industries.

A Signature Energy Keynote

The energy industry powers economies, secures nations, and solves some of the world's most complex engineering and operational challenges. Yet behind every successful energy executive is another equally complex system that rarely receives the same level of coordination: the wealth, career decisions, family priorities, and life transitions created over decades in one of the world's most demanding industries.

Building wealth has never been the defining challenge for many energy executives. Coordinating wealth across increasingly complex careers, executive compensation, international assignments, commodity cycles, leadership responsibilities, and evolving life priorities is where long-term prosperity is ultimately determined.

Drawing from more than two decades of advising executives, studying financial behavior, and helping leaders navigate complexity, Dr. Preston Cherry brings a distinctive perspective that connects executive wealth, leadership, human behavior, and Financial Harmony™ into one integrated conversation about what it truly means to build a successful life alongside a successful career.

Oil & Gas Keynotes

The Energy Executive's Wealth Equation

Why the World's Most Complex Careers Require a New Way of Thinking About Wealth

Energy executives spend their careers managing complexity. They oversee billion-dollar assets, navigate commodity cycles, lead through uncertainty, relocate across continents, manage geopolitical risk, and make decisions that shape companies, communities, and global energy security. Along the way, they often accumulate significant wealth, but they also inherit increasingly complex financial lives.

The defining wealth management challenge for today's energy executive is no longer simply creating wealth. It is coordinating wealth across demanding careers, executive compensation, family priorities, changing life phases, and the realities of one of the world's most dynamic industries. Exceptional wealth management begins with understanding the life that created the wealth. In the energy industry, that life is unlike any other.

Rather than approaching wealth as a collection of disconnected financial decisions, Dr. Preston Cherry presents a new way of thinking about executive prosperity, one that recognizes wealth as an integrated system requiring the same intentional coordination executives bring to the complex organizations they lead. Through the philosophy of Financial Harmony™, audiences discover how executive compensation, financial planning, leadership, family priorities, personal purpose, and human behavior work together to create enduring financial confidence and long-term well-being.

This is not another keynote about markets, investing, or retirement. It is a conversation about the executive experience of wealth in the energy industry and why the leaders responsible for powering the world deserve a wealth strategy as coordinated, resilient, and forward-looking as the systems they build every day.

Executive Outcomes

- Recognize why executive wealth in the energy industry requires a fundamentally different approach than traditional wealth management.
- Understand how career complexity, executive compensation, leadership responsibilities, and life transitions shape long-term financial outcomes.
- Replace fragmented financial decisions with a coordinated approach to wealth, career, family, and purpose.
- Gain practical insights for navigating concentrated equity, deferred compensation, retirement timing, tax complexity, and multi-generational planning with greater confidence.
- Leave with a broader perspective on building not only financial success, but enduring prosperity throughout every phase of an energy career.

Key Takeaways

- The greatest wealth management challenge for today's energy executives is coordinating wealth, not simply accumulating it.

- Career success and financial success are not synonymous without intentional coordination.
- Executive compensation creates opportunity, but long-term prosperity requires integration.
- Financial Harmony™ provides a philosophy for aligning wealth with career, family, purpose, and long-term well-being.
- Exceptional wealth management begins with understanding the life that created the wealth.
- The strongest legacy energy leaders create is measured not only by the energy they produce, but by the life their success makes possible.

Formats, Audiences & Speaking Inquiries

Formats Available

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

Ideal Audiences

- Global energy conferences
- Executive leadership summits
- Oil & gas corporate events
- Energy company boards and leadership teams
- Industry associations and trade organizations
- Executive compensation and benefits forums

Why Dr. Preston Cherry

Dr. Cherry brings a rare combination of technical wealth expertise, behavioral finance, financial psychology, executive judgment, and human-centered interpretation to one of the world's most complex industries. He is not simply explaining finance. He is helping energy executives understand how career, compensation, family, and purpose come together to create enduring prosperity.

Speaking Inquiries

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