

Dr. Preston D. Cherry

Press Kit | Bios, Digital Presence & Contact

CFP® | Ph.D. | AFC® | CFT™ | Creator, Financial Harmony™ | Author | Keynote Speaker

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Ph.D. in Personal Financial Planning | CFP® | AFC® | CFT™ | Top 10 Investopedia 100 | 2025 FPA Heart of Financial Planning Award

Introduction Lines

Use these exact lines for consistency across all platforms, media, and event materials.

TV, Broadcast & On-Camera Introduction

For lower thirds, pre-show copy, and on-camera host introductions.

Dr. Preston Cherry, founder of Concurrent Wealth Management and author of Wealth in the Key of Life: Finding Your Financial Harmony.

Editorial & Publication Bio

For article bylines, contributor pages, and print features. When publishing, please include the backlinks to Dr. Preston Cherry and Concurrent Wealth Management as shown.

[Dr. Preston Cherry](#) is a Houston-based flat-fee fiduciary financial advisor and founder of [Concurrent Wealth Management](#), working directly with high-income Gen X professionals and oil & gas executives on retirement, tax, and investment decisions during major life and career transitions. He is the author of *Wealth in the Key of Life: Finding Your Financial Harmony*.

Podcast Introduction & Show Notes Bio

Use for podcast host introductions and show notes. When publishing show notes, please include the backlinks to Dr. Preston Cherry and Concurrent Wealth Management as shown.

[Dr. Preston Cherry](#) is a flat-fee fiduciary financial advisor, Ph.D., CFP®, Certified Financial Therapist™, and author of *Wealth in the Key of Life: Finding Your Financial Harmony*. He is the creator of Financial Harmony™ and founder of [Concurrent Wealth Management](#) in Houston, Texas. Dr. Cherry explores the intersection of financial strategy, identity, behavioral finance, and the life-centered realities of money decisions. His work has been featured in The New York Times, Wall Street Journal, Kiplinger, and AARP.

Bios

All Formats

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2025 FPA Heart of Financial Planning Award

Stage Introduction

To be read by the event moderator or MC. Do not edit.

Our next speaker has built something rare in the financial world: a body of work that is simultaneously a Ph.D.-level clinical framework, a proprietary wealth doctrine, and a personal origin story forged through adversity.

He is the creator of Financial Harmony™, a framework for life-aligned finances through wealth-secured well-being. It aligns your finances, identity, decisions, and life aspirations. The result is permission to live fully, with the purpose and preferences you value most. He is the author of *Wealth in the Key of Life: Finding Your Financial Harmony*. A Certified Financial Planner®, Certified Financial Therapist™, Accredited Financial Counselor®, and Ph.D. in Personal Financial Planning.

A Top 10 Investopedia 100 Financial Advisor and recipient of the 2025 FPA Heart of Financial Planning Award, his work has been featured in *The New York Times*, *The Wall Street Journal*, *Kiplinger*, and *AARP*, and he is a frequent contributor on Schwab Network, Nasdaq Trade Talks, and CNBC Arabia.

He is the founder of Concurrent Wealth Management, a Houston-based flat-fee fiduciary firm, and a Distinguished Alumnus of the Texas Tech University School of Financial Planning.

Please welcome Dr. Preston Cherry.

Full Bio (250 words)

Dr. Preston D. Cherry believes life's most important financial decisions are rarely isolated money decisions. They emerge through transitions, setbacks, reinventions, and defining life moments that shape who we are and how we want to live.

His answer is Financial Harmony™: life-aligned finances through wealth-secured well-being. At its center is Return on Alignment™ (ROA), a measure of how effectively your financial planning and strategy support the life you actually want to live. The result is intentional wealth accumulation and aligned deployment, with permission to live, decide, and evolve with purpose.

An independent, flat-fee financial advisor and founder of Concurrent Wealth Management, Dr. Cherry works directly with high-income Gen X professionals, business owners, and oil & gas executives on retirement, tax, investment, and life-transition decisions.

His work explores the Humanity of Money™, the emotional, behavioral, and life-centered realities that traditional financial advice overlooks, and the tension between over-maximizing financial decisions and thoughtfully optimizing a financial life aligned with evolving life realities. Dr. Cherry also publishes research in behavioral finance and financial psychology in leading peer-reviewed journals, advancing the field of life-aligned wealth.

His insights have been featured in The New York Times, The Wall Street Journal, Kiplinger, MarketWatch, Barron's, Investment News, Yahoo Finance, and AARP. He is a frequent contributor on Schwab Network, Nasdaq Trade Talks, CNBC Arabia, and Morningstar.

Dr. Cherry holds a Ph.D. in Personal Financial Planning and is a Certified Financial Planner®, Accredited Financial Counselor®, and Certified Financial Therapist™. He is a past president of the Financial Therapy Association, recipient of the 2025 FPA Heart of Financial Planning Award, and Distinguished Alumnus of the Texas Tech University School of Financial Planning.

Medium Bio (100 words)

Dr. Preston D. Cherry is a flat-fee fiduciary financial advisor, Ph.D., keynote speaker, and author of *Wealth in the Key of Life: Finding Your Financial Harmony*. He is the founder of Concurrent Wealth Management and creator of Financial Harmony™, a framework for life-aligned wealth strategy. Dr. Cherry works directly with high-income Gen X professionals, business owners, and oil & gas executives on retirement, tax, and investment decisions. A Top 10 Investopedia 100 Financial Advisor and 2025 FPA Heart of Financial Planning Award recipient, his work has been featured in *The New York Times*, *Wall Street Journal*, *Kiplinger*, *AARP*, and *Barron's*.

Short Bio (50 words)

Dr. Preston Cherry is a flat-fee fiduciary financial advisor, keynote speaker, and author of *Wealth in the Key of Life: Finding Your Financial Harmony*. Creator of Financial Harmony™ and founder of Concurrent Wealth Management. Top 10 Investopedia 100 Financial Advisor. 2025 FPA Heart of Financial Planning Award recipient.

Media & Recognition

Press Features, Credentials & Awards

Featured In

The New York Times | The Wall Street Journal | Kiplinger | MarketWatch | Barron's | Investment News | Yahoo Finance | AARP | Investopedia | CNBC | CNBC Arabia | Schwab Network | Nasdaq Trade Talks | Morningstar

Awards & Recognition

- Top 10 Investopedia 100 Financial Advisor
- 2025 FPA Heart of Financial Planning Award
- Texas Tech University School of Financial Planning Distinguished Alumni Award
- Investopedia Advisor Council Member
- Past President, Financial Therapy Association

Digital Presence

Social Media, Profiles & Recognition Links

Dr. Preston Cherry

Website: www.drprestoncherry.com

LinkedIn: [@drprestoncherry](https://www.linkedin.com/in/drprestoncherry)

Instagram: [@drprestoncherry](https://www.instagram.com/drprestoncherry)

YouTube: [@DrPrestonCherry](https://www.youtube.com/DrPrestonCherry)

X (Twitter): [@DrPrestonCherry](https://twitter.com/DrPrestonCherry)

TikTok: [@drprestoncherry](https://www.tiktok.com/@drprestoncherry)

Threads: [@drprestoncherry](https://www.threads.net/@drprestoncherry)

Substack: [@drprestoncherry](https://www.substack.com/profile/drprestoncherry)

Concurrent Wealth Management

Website: www.concurrentfp.com

LinkedIn: [Concurrent Wealth Management](https://www.linkedin.com/company/concurrent-wealth-management)

Instagram: [@concurrentwealth](https://www.instagram.com/concurrentwealth)

Facebook: [Concurrent Wealth](https://www.facebook.com/concurrentwealth)

X (Twitter): [@concurwealth](https://twitter.com/concurwealth)

The Financial Harmony™ Podcast (YouTube):

<https://www.youtube.com/@DrPrestonCherry>

The Financial Harmony™ Podcast (Apple & Spotify):

<https://www.concurrentfp.com/podcast/>

Speaker Reel

Use for event preview pages, booking decks, and social promotion of engagements.

[Speaker Reel](#)

Recognition & Credential Profiles

Investopedia Top 10 Financial Advisor: <https://www.investopedia.com/inv-100-top-financial-advisors-7556227>

Investopedia Advisor Council: <https://www.investopedia.com/advisor-council-8694632>

Kiplinger Author Profile: <https://www.kiplinger.com/author/dr-preston-d-cherry-cfp-r-ph-d>

2025 FPA Heart of Financial Planning Award:
<https://www.financialplanningassociation.org/press-room/releases-announcements/2025-heart-of-financial-planning-award>

Media & Booking Inquiries

www.drprestoncherry.com/speaking