

SIGNATURE KEYNOTES

Financial Harmony™, Identity, Wealth & the Humanity of Money™

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 wealth management, identity, and the human dimensions of capital. He is the creator of Financial Harmony™, the Humanity of Money™, and the Five Permissions of Wealth™ — proprietary frameworks exploring how people make meaning with money.

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 keynotes exploring the human relationship with money, identity, purpose, financial behavior, and life-aligned prosperity. Designed for executive leadership events, global conferences, financial institutions, universities, corporations, and organizations seeking conversations that move beyond financial strategy to explore the human experience of wealth.

Bankruptcy to Balance

Life's Defining Moments Shape Your Financial Future

Permission to Prosper

Live Well with the Wealth You've Built

The Humanity of Money™

Financial Decisions Are Never Just Financial

A Signature Speaking Platform for Financial Harmony™

Money is never only about money. It reflects identity, relationships, culture, purpose, fear, opportunity, and the lives people are trying to build. Every financial decision is ultimately a human decision, and lasting prosperity requires more than technical expertise alone.

Drawing from Financial Harmony™, the Humanity of Money™, the Five Permissions of Wealth™, and more than two decades of work in wealth management, behavioral finance, and financial psychology, Dr. Preston Cherry's Signature Keynotes explore how people make meaning with money — and how better financial decisions create more aligned lives.

Rather than offering motivational finance or technical instruction, these conversations challenge audiences to rethink what wealth is ultimately for. They provide practical frameworks for aligning financial strategy with identity, purpose, relationships, and long-term well-being, empowering people to make decisions with greater clarity, confidence, and conviction.

The Platform

Financial Reality, Interpreted. Financial Harmony™ is the philosophy connecting Dr. Cherry's Signature Keynotes. It recognizes that financial planning is not simply about accumulating wealth — it is about helping people discover what money is for and aligning financial strategy with the life they are intentionally building.

Signature Keynotes

Bankruptcy to Balance

Life's Defining Moments Shape Your Financial Future

Success does not immunize us from financial misalignment. Many of life's most important financial decisions are shaped not during seasons of certainty, but in moments of transition, disappointment, unexpected change, and the quiet realization that outward success and inner alignment are not always the same.

In this deeply personal keynote, Dr. Preston Cherry shares the experiences that ultimately inspired Financial Harmony™ — not simply to tell his story, but to help you better understand your own relationship with money, identity, purpose, and the life you're trying to build. Through honest reflection, practical insight, and the frameworks that emerged from his own journey, audiences discover that financial transformation is not about becoming someone different. It is about becoming more fully aligned with who you already are.

Whether you are navigating a career transition, redefining success, recovering from financial setbacks, or simply sensing that something feels out of alignment despite external achievement, this keynote offers a language for understanding those moments and a framework for moving forward with greater confidence, intention, and clarity.

Experienced Outcomes

- Experience a new way of understanding the relationship between money, identity, and the life you're building.
- Recognize the difference between external financial success and internal financial alignment.
- Gain practical frameworks for navigating life's transitions with greater clarity, confidence, and purpose.
- Reframe financial setbacks and major life changes as opportunities for intentional growth rather than permanent definitions.
- Leave with greater confidence to make financial decisions that reflect your values, aspirations, and evolving life.

Key Takeaways

- The Four T's™ — Trials, Triumphs, Transitions, and Transformations — shape every financial journey.
- The Six-A Alignment System™ provides a roadmap from awareness to aligned action.
- Return on Alignment™ (ROA) asks whether your financial strategy is supporting the life you're trying to build.
- Financial transformation begins with honest self-awareness and continues through intentional action.

Permission to Prosper

Live Well with the Wealth You've Built

Many financially successful people know how to build wealth. Far fewer know how to live with it confidently. They delay opportunities they can afford. They second-guess meaningful financial decisions. They quietly wonder whether they've earned the right to enjoy the life their success has made possible. The challenge is rarely a lack of financial discipline. It is the absence of a way to confidently align wealth with life.

In this keynote, Dr. Preston Cherry explores why financial success often creates a new challenge that few people anticipate: learning to confidently live with the wealth they've worked so hard to build. Drawing from Financial Harmony™, he introduces the Five Permissions of Wealth™ — Person, Purpose, Preferences, Phases, and Plan — a doctrine for transforming financial success into life-aligned financial planning.

Audiences leave with practical strategies for making financial decisions with less guilt, less second-guessing, and greater confidence that their wealth is supporting the life they genuinely want to live. Permission to Prosper is not about abandoning discipline. It is about confidently living a disciplined financial plan without unnecessary comparison, external justification, or internal doubt.

Experienced Outcomes

- Replace financial guilt, comparison, and decision fatigue with greater clarity and conviction.
- Learn how the Five Permissions of Wealth™ create a practical doctrine for life-aligned financial planning.
- Make financial decisions with less second-guessing and greater confidence in your own values and priorities.
- Understand how thoughtful planning creates the freedom to evolve through changing life phases without losing financial discipline.
- Leave with greater confidence to enjoy the wealth you've built in ways that reflect who you are and the life you want to live.

Key Takeaways

- Financial planning helps people discover what money is for.
- Person, Purpose, Preferences, Phases, and Plan work together to create Financial Harmony™.
- Optimization creates more durable financial well-being than endless maximization.
- Return on Alignment™ (ROA) measures whether your financial strategy is supporting the life you're intentionally building.
- Prosperity is experienced when wealth, identity, and life are fully aligned.

The Humanity of Money™

Financial Decisions Are Never Just Financial

Money is never simply about dollars and cents. Every financial decision reflects identity, relationships, culture, expectations, opportunity, fear, hope, and the stories people tell themselves about success. Behind every balance sheet is a human being, and behind every financial decision is a life trying to find meaning.

In this keynote, Dr. Preston Cherry introduces the Humanity of Money™ — a philosophy that reframes financial decision-making through the lens of psychology, culture, behavior, and lived experience. Rather than separating financial strategy from the human realities that shape it, he demonstrates how understanding the emotional and relational dimensions of money leads to better decisions, stronger relationships, and more enduring financial outcomes.

Whether addressing global audiences, financial professionals, or organizational leaders, this keynote provides a new language for understanding why money is ultimately a human experience before it is a financial one. Audiences leave with practical insights for building trust, improving communication, and making financial decisions that recognize both the technical realities of wealth and the people whose lives it is meant to serve.

Experienced Outcomes

- See financial decisions through the lens of identity, relationships, and human behavior.
- Recognize how culture, values, and lived experiences influence financial choices.
- Develop greater empathy for the diverse ways people experience money.
- Build a more human-centered approach to financial conversations, leadership, and decision-making.
- Leave with a deeper understanding of why lasting financial success begins with understanding people.

Key Takeaways

- Financial decisions are never just financial.
- Every financial strategy succeeds or fails within a human context.
- Understanding the Humanity of Money™ strengthens trust, communication, and long-term decision-making.
- Better financial outcomes begin with a better understanding of people.

Formats, Audiences & Speaking Inquiries

Formats Available

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

Ideal Audiences

- Executive leadership events
- Global conferences and summits
- Financial institutions and wealth management firms
- Universities and academic institutions
- Corporations and organizational leadership teams
- Family offices and UHNW communities

Why Dr. Preston Cherry

Dr. Cherry brings a rare combination of technical wealth expertise, behavioral finance, financial psychology, and lived experience to one of the most human conversations in finance. He is not simply explaining money. He is helping audiences understand how identity, purpose, and life alignment shape the financial decisions that matter most.

Speaking Inquiries

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