

Concurrent Financial Planning Bolsters Team with Leading Financial Advisors

Concurrent Financial Planning announces the expansion of its team with the addition of three wealth advisors with Ph.D.s in financial planning.

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[Concurrent Financial Planning](#) proudly announces the expansion of its team with the addition of seasoned financial professionals dedicated to enhancing the financial well-being of individuals and institutions alike.

[Dr. Preston Cherry](#) CFT-I™, CFP®, Founder and Owner of Concurrent Financial Planning, expresses excitement about the recent growth, stating, "Concurrent Financial Planning has added a managing director with a global perspective and three wealth advisors with Ph.D.s in financial planning. These professionals will help more people achieve their desired lifestyles, assist institutions in managing investments, and drive growth for the company."

Among the notable additions to the team is Dr. Eiman Osseilan, who brings a wealth of experience and a human-centric approach to financial planning. Dr. Osseilan emphasizes, "I chose to join Concurrent because they use a global and human approach to assisting people with their finances. We provide experienced financial advice to households and institutions that is meaningful and tangible. With our new team, Concurrent will be able to meet and exceed our growth demands and provide measurable services."

Ajamu C. Loving, PhD, shares his enthusiasm for joining Concurrent, stating, "I am so pleased to have the opportunity to work with a group that has nearly a century of financial services and research experience but the modern resources to take our clients and their families into a bold new future. Concurrent embodies my personal philosophy of 'people are more important than



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*Dr. Preston Cherry, CFT-I™,
CFP®*

things,' and I look forward to making a positive impact together."

Philip Gibson, Ph.D., CFP®, expresses his satisfaction in joining a firm aligned with his values, remarking, "I am pleased to join a firm where I can serve as a financial planner alongside colleagues who share a similar background. We are all academics with PhDs in Personal Financial Planning, bringing a high level of expertise and experience to those individuals we work with."

Mark Evers, Ph.D., CFP®, CRPC®, highlights the importance of holistic financial planning, saying, "I chose to join the team at Concurrent because the team shares the philosophy, values, and modern resources to serve families on their financial journey. Financial planning is more than just money. It is about using money to support our life goals, creating life money balance. I want to help our clients learn to master their money, so that it serves them as a tool to obtain the life they desire."

Concurrent Financial Planning is dedicated to providing a people-first approach to financial advice, prioritizing trust, financial planning, and connection. The new team of advisors will support the company's growth initiatives while striving to promote the advancement of their clients' financial well-being.

About Concurrent Financial Planning: Concurrent Financial Planning is a people-first financial advice firm that helps professionals and business owners reach their version of financial freedom with confidence. Serving clients virtually across the United States, we deliver advice through the Life Money Balance® philosophy, letting your life lead your money so they work concurrently to achieve your life's design.

Concurrent Financial Planning is dedicated to providing a people-first approach to financial advice, prioritizing trust, financial planning, and connection. The new team of advisors will promote the advancement of their client's financial well-being and support the company's growth initiative to reach \$100 million in assets or revenue equivalent in twelve months.

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