

Concurrent Wealth Management Relocates Headquarters to Houston

Firm founded by Dr. Preston D. Cherry, Ph.D., CFP®, reconnects to Cypress roots and expands Financial Harmony™ planning for Gen X professionals and executives.

HOUSTON, TX, UNITED STATES, August 22, 2025 /EINPresswire.com/ --

[Concurrent Wealth Management](#),

founded by nationally recognized financial planner and author [Dr. Preston D. Cherry, Ph.D., CFP®](#),

has

officially relocated its headquarters to

Houston, Texas. The move reconnects Dr. Cherry to his hometown roots, having grown up in Cypress, Texas, and attended Prairie View A&M University.



CONCURRENT
WEALTH MANAGEMENT

Concurrent Wealth Management Logo

“

High-achieving careers don't always mean financial security. True confidence comes when work feels optional, money guilt fades, and retirement becomes a reality.”

Dr. Preston Cherry

The firm's relocation strengthens its mission to serve high-income Gen X professionals, oil & gas executives, and entrepreneurs across the region with its flagship philosophy of Financial Harmony™—the alignment of wealth and well-being through life-centered financial planning.

“Making a great living in a high-achieving career or business doesn't always mean you feel financially secure,” said Dr. Cherry, Founder and President of Concurrent Wealth Management. “We help clients build a financial plan

they can actually trust so work becomes optional, money guilt fades, and retirement becomes a confident reality, not a question mark.”

Concurrent Wealth Management differentiates itself through:

- Flat-fee, all-inclusive financial planning, including investment management
- Life-centered strategy integrating behavioral finance and financial therapy
- Proprietary Financial Harmony Compass™ framework for clarity and confidence

As part of its Houston launch, Dr. Cherry will host a complimentary webinar tailored to oil & gas executives:

"The Oil & Gas Retirement Sprint:
Smart Tax & Investment Moves Before
2025"
October 27, 2025 | 12 PM CT.

This session will cover tax-smart retirement strategies, equity compensation, and investment moves designed for high-income oil & gas professionals preparing for the next chapter of their financial lives.



Dr. Preston D. Cherry, Founder & President of
Concurrent Wealth Management

Dr. Cherry is a top 10 Investopedia financial advisor, recipient of the Financial Planning Association's Heart of Financial Planning award, Texas Tech School of Financial Planning Distinguished Alumni Award recipient, and author of [Wealth in the Key of Life](#) (Wiley, 2024). He frequently appears on Investopedia, Yahoo Finance, and Kiplinger and serves as a leading voice in financial planning, financial therapy, and wealth psychology.

Preston Cherry
Concurrent Wealth Management
+1 832-744-1176
contact@concurrentfp.com
Visit us on social media:
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