

# CORRECTION: Concurrent Wealth Management Relocates HQ to Houston, Oil & Gas Retirement Webinar Aug 27

*Correction: The free event, "The Oil & Gas Retirement Sprint: Smart Tax & Investment Moves Before 2026," will be held August 27, 2025, at 12 PM CT.*

HOUSTON, TX, UNITED STATES, August 25, 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 establishes

Houston as the firm's primary base of operations, where it serves clients both virtually and in person across Texas and nationwide.



**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 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

The Oil & Gas Retirement Sprint: Smart Tax & Investment Moves Before 2026  
□ August 27, 2025 | □ 12 PM CT

This complimentary session will cover how Houston oil & gas professionals can prepare for 2025 tax law shifts and make smart tax moves before 2026 to optimize retirement readiness. Topics include tax-efficient retirement strategies, equity compensation planning, and investment considerations for high-income Gen X executives preparing for the future.



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 CNBC, Yahoo Finance, and Kiplinger, and serves as a leading voice in financial planning, financial therapy, and wealth psychology.

### About Concurrent Wealth Management

Concurrent Wealth Management helps high-income Gen X professionals align their wealth with their life through Financial Harmony™. Headquartered in Houston, CWM offers flat-fee all-inclusive financial planning—including investment management, fiduciary guidance, and values-driven strategies for professionals, executives, and entrepreneurs. The firm operates as a virtual + in-person hybrid, with Houston as its official headquarters and hub for serving clients across Texas and nationwide.

### About Dr. Preston D. Cherry

Dr. Preston D. Cherry, Ph.D., CFP®, is the Founder and President of Concurrent Wealth Management. A Cypress, Texas native and Prairie View A&M graduate, he is a nationally recognized financial planner, educator, and author. He is a top 10 Investopedia financial advisor, recipient of the Financial Planning Association's Heart of Financial Planning award, and Distinguished Alumni Award recipient from Texas Tech University's School of Financial Planning. His book, *Wealth in the Key of Life* (Wiley, 2024), explores the connection between money, well-being, and identity.

Preston D Cherry  
Concurrent Wealth Management  
+1 832-744-1176  
contact@concurrentfp.com  
Visit us on social media:  
[LinkedIn](#)  
[YouTube](#)  
[X](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/842844466>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.