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Concurrent Wealth Management Launches Financial Harmony™ Membership, Redefining Access to Fiduciary Guidance

A fiduciary, people-first membership redefining access to trusted financial guidance beyond the outdated 1% AUM model and "guru" culture.

Dr. Preston D. Cherry, CFP®, Ph.D., Founder & President of Concurrent Wealth Management, launches the Financial Harmony™ Membership

HOUSTON, TX, UNITED STATES, September 12, 2025 / EINPresswire.com/ -- Many people want financial guidance but don't need or can't access a full-service financial plan. Some only need answers to a few burning questions. Others prefer to manage most of their own money but want professional input along the way. Too often, these investors are locked out of expert advice because traditional firms require high asset minimums.

To close this gap, Concurrent Wealth Management, founded by CFP® professional and financial therapist Dr. Preston D. Cherry, today announced the launch of the Financial Harmony™ Membership — a first-of-its-kind platform designed for Gen X professionals, retirees, and older millennials who want flexibility and access to fiduciary guidance without the barriers of traditional models.

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> Access to financial planning guidance should not be reserved only for those with millions. The Financial Harmony™ Membership meets people where they are with fiduciary, people-centered guidance."
>
> *Dr. Preston D. Cherry, Founder & President, Concurrent Wealth Management*

The old 1% assets-under-management (AUM) model left millions of hardworking professionals underserved or priced out. The Financial Harmony™ Membership redefines access by making fiduciary guidance available through a transparent, community-driven model – Fiduciary Group Financial Guidance™ (FGFG™) – that prioritizes people over portfolios and client needs over account balances.

“Access to high-quality financial planning guidance should never be reserved only for those with millions in the bank,” Dr. Cherry said. “The Financial Harmony™ Membership is about meeting people where they are — providing fiduciary, credentialed, people-centered guidance that aligns money with life and well-being. Too many are left chasing financial ‘gurus’ or doing it all on their own. This is about giving people trustworthy guidance they can actually rely on.”

Concurrent Wealth Management logo — highlighting the firm’s launch of the Financial Harmony™ Membership, expanding access to fiduciary guidance for Gen X, retirees, and older millennials

A NEW CATEGORY OF FINANCIAL GUIDANCE

The Financial Harmony™ Membership introduces a new industry lane: Fiduciary Group Financial Guidance™ (FGFG™). Unlike traditional AUM-based advice, FGFG™ offers:

--Membership, transparent pricing – no hidden fees, no percentage-of-assets charges.
--Monthly group sessions led by fiduciary planners – actionable guidance, education, and accountability.
--Community and connection – members learn together, ask questions, and gain perspective from peers navigating similar financial challenges.
--Life-aligned approach – guidance centered on values, goals, and well-being, not just numbers on a statement.

While the FGFG™ framework is designed for Gen X, it is equally adaptable to retirees seeking income clarity and older millennials balancing careers, families, and wealth-building.

EXPANDING ACCESS, NOT REPLACING 1:1 ADVICE

The Financial Harmony™ Membership expands access to fiduciary planning for those who have traditionally been left out of the advice marketplace. For individuals seeking more comprehensive, personalized planning, Concurrent Wealth Management continues to offer flat-fee, 1:1 advisory services — ensuring clients across life stages and wealth levels have an aligned, fiduciary path forward.

RESHAPING THE INDUSTRY

Concurrent Wealth Management’s launch of the Financial Harmony™ Membership signals a larger shift in financial advice: away from the asset-gatekeeping AUM model and toward inclusive, fiduciary, life-centered guidance.

“We’re not disrupting financial advice to break it,” Dr. Cherry added. “We’re evolving it to work for more people. This is about trust, transparency, and human connection — the things money was always supposed to support.”

AVAILABILITY
The Financial Harmony™ Membership portal officially opens November 1, 2025. Concurrent Wealth Management is currently enrolling founding members at a special rate of $1,200/year (regularly $1,500/year). Enrollment includes access to monthly FGFG™ sessions, a private member forum, educational resources, and ongoing financial insights curated for Gen X professionals, retirees, and older millennials.

ABOUT CONCURRENT WEALTH MANAGEMENT
Concurrent Wealth Management is a Houston-based fiduciary wealth management firm serving Gen X professionals, entrepreneurs, retirees, and high-income earners. Founded by Dr. Preston D. Cherry, CFP®, Ph.D., CWM delivers comprehensive flat-fee financial planning and investment management alongside its pioneering Financial Harmony™ Membership. Dr. Cherry is a nationally recognized financial planner, professor, speaker, and author of Wealth in the Key of Life.

Learn more about the Financial Harmony™ Membership at:
https://www.concurrentfp.com/financial-harmony-membership/

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