



Dr. Preston D. Cherry, AFC®, CFT-I™, CFP®

Founder & President of Concurrent Financial Planning, Head of the Financial Planning Program, and Director of the Charles Schwab Center for Personal Financial Planning at the UW – Green Bay

Preston specializes in empowering individuals to share stories that inform their financial resources and life's design to achieve financial wellness and freedom that cultivates life wholeness. Preston has over 15 years of financial services and academic experience, including financial planning and investment management, published research in top journals, such as Personality and Individual Differences and Journal of Personal Finance, and extensive leadership in the planning profession. His current research surrounds personality traits and financial uncertainty risks and specializes in financial psychology. Preston has been cited by the New York Times, Forbes, the Wall Street Journal, CNBC, and Yahoo Finance. He is an Investopedia 100 Top Financial Advisor, 2022 ThinkAdvisor LUMINARY Finalist, WealthManagement.com Ten to Watch in 2023, President of the Financial Therapy Association, practitioner editor of the award-winning Journal of Financial Planning, and Board Member of the FinServ Foundation. Preston is currently engaged, a cool Uncle who writes poetry, and has a vinyl record collection

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