Preferred version (203 words)

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

Dr. Cherry is the Founder & President of Concurrent Financial Planning, LLC, a firm that helps households and business owners achieve Life Money Balance™. Dr. Cherry serves as Assistant Professor of Finance and Head of the Personal Financial Planning Program at the University of Wisconsin – Green Bay. His current research surrounds personality traits and financial uncertainty risks and specializes in financial psychology. Over 14 years, he has served in lead financial planning roles, an RIA co-investment manager of $120M in firm assets, and a mutual fund wholesaler. He currently serves as a financial advisor coach for Carson Group Coaching. His degrees include a Ph.D. in Personal Financial Planning from Texas Tech University and B.B.A. in Finance from Prairie View A & M University. Dr. Cherry serves as President for the Financial Therapy Association, serves on the CFP Board Council on Education, the Association of African American Advisors Foundation Board, the Editorial Board of the Journal of Personal Finance, and Practitioner Editor for the Journal of Financial Planning. Preston is currently engaged, a cool Uncle, writes poetry, and has a vinyl record collection. He has been published in the *Wall Street Journal*, *NerdWallet*, *The New York Magazine blog The Cut*, and *The Motley Fool.*

Short version (176 words)

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State of WI only (208 words)

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