

Episode 1:

What is a Multi-Family Office?

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In this kickoff episode, the StoryOne partners unpack what it means to be a multi-family office, and why it matters for families navigating complex wealth. From untangling estate plans to guiding generational transitions, they share how deep listening and heart-led strategy allow them to serve families at the highest level.



Featuring:

John Christensen
Cameron Bond
Kenny Conklin

Common Client Profiles

- Business owners nearing exit
- First-generation wealth creators
- Families with legacy trusts or intergenerational goals
- Charitable givers wanting a strategic, mission-aligned plan

What is a Multi-family office?

- Ideal for families with \$20M - \$500M in net worth
- Offers comprehensive, team-based solutions for complex estate plans, charitable giving and succession

Strategy Rooted in Relationship

- “We end up in our client’s living room”, emphasizing depth, trust and presence
- Family culture, values and faith drive the decisions as much as the dollars
- Inertia is the biggest competitor
- Change takes courage and clarity

Complexity is the Norm

- At \$20M+, financial complexity “blooms”, from tax to trusts to family dynamics
- Most families at this level are under-advised or need organization
- StoryOne brings clarity, cohesion and long-term planning

The Approach

- 250+ hours per year often go into serving a single family
- Begins with discovery: data + story = direction
- Planning is tailored (not templated), every family is unique

Favorite Metaphors

- “Sheep and pens”
We help organize chaos before new assets or decisions arrive
- “Looking at the far horizon”
Planning for 25, 50 or even 100 years into the future



Notable Quotes

“It’s not about selling a product. It’s about doing what’s right, no matter how long it takes.”

-Cameron Bond

“If this wealth is going to ruin my family, I’d rather give it all to charity.”

-John Christensen (on the emotional weight of legacy)