

Episode 4:

## The Right Mix: Finding Your Family's Asset Allocation



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In this episode, the StoryOne partners explore how families can approach asset allocation through the lens of stewardship. They unpack public markets, private equity, real estate, and venture capital; highlighting both opportunities and risks. The conversation offers practical wisdom for families who want a balance sheet that reflects their story and supports their legacy.



### Featuring:

John Christensen  
Cameron Bond  
Kenny Conklin

### Asset Allocation

- Risk, liquidity needs, long term goals and opportunity cost all need to be considered when evaluating asset allocation.
- Proper allocation across private markets, including private real estate, private equity, and venture capital, as well as public markets such as stocks, ETFs, mutual funds, and bonds, is essential.

### Asset Location

- Where funds are invested also needs to be considered: taxable accounts, qualified accounts (Roth, IRA, 401k, etc.) and non-profits all have different tax treatment.
- Tax efficiency and liquidity of the investment need to align.
- Family decisions should support shared goals and avoid losing money that could be used for giving or legacy projects.

### Investing with Purpose

- True wealth is measured not only in growth but in alignment with values.
- Asset allocation becomes a tool to reinforce purpose, stewardship and impact across generations.

### The Role of Liquidity

- Liquidity often goes unnoticed until it's needed; without it, flexibility disappears.
- Families must keep enough accessible capital to weather challenges and seize opportunities.

### Understanding the Landscape

- Families today face a mix of asset classes, such as public markets, real estate, private equity and venture capital. Each have unique opportunities and risks.
- Asset allocation is not about prediction but positioning: stewarding resources wisely across the portfolio.



### Notable Quotes

**“A lot of times you don’t know what liquidity is until you don’t have it and you need it.”**

-John Christensen

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