Episode 1:

What is a Multi-Family Office?

StoryLens Podcast One-Sheet Snapshot

Listen & Subscribe: Apple Podcasts · Spotify · YouTube

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)

StoryOne

story-one.com hello@story-one.com (913) 544-0600

StoryOne Family Office, LLC is a Registered Investment Advisor, registered with the Securities and Exchange Commission. Registration as an investment adviser does not imply a certain level of skill or training, and the content of this communication has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.