StoryLens Podcast One-Sheet Snapshot

Episode 2:

Your Story Comes First

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How do you plan wisely for the future without losing sight of what matters most? In this episode, the StoryOne partners unpack the origin of the firm's name, the StoryLens process, and how they help families make values-based decisions around wealth, legacy, and giving.



Featuring:
John Christensen
Cameron Bond
Kenny Conklin

Why StoryOne?

- The firm name was inspired by the book, *The Eden Option*, which discusses God's intended story (Story 1) versus self-directed paths (Story 2).
- The name affirms our commitment to walk with families as they lean into their story.

Family Dynamics Uncovered

- Legacy planning often reveals hidden emotional drivers, like loyalty, grief or family roles.
- StoryOne helps families make sense of these unspoken influences to move forward with confidence.

Why Story Comes First

- Traditional planning begins with balance sheets; StoryOne begins with listening.
- The process starts by uncovering what brings a family's heart to life.

Charitable Giving with Intention

- Donor-advised funds (DAFs) are a key tool, but governance and communication are just as critical.
- StoryOne helps families clarify their giving philosophy across generations.

The StoryLens Process

- A multi-layered discovery framework that blends emotional clarity with technical depth.
- Designed to surface family values, relational dynamics, fears and generational hopes.

Wealth as a Stewardship Journey

- Many business owners now face a new calling: stewarding growing wealth with the same care they gave their business.
- Compounding wealth demands long-term thinking, clarity and intentional governance.

Notable Quotes

"The StoryLens doesn't solve problems. It helps us understand the heart of the family so the solutions come from a place of deep alignment."
-John Christensen

"Sometimes the right financial answer isn't the right emotional answer. That's why we walk alongside families with both truth and grace."
-Cameron Bond

StoryOne

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

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