Episode 6:

The Great Wealth Transfer & Creative Succession Planning

StoryLens Podcast One-Sheet Snapshot

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In this episode, the StoryOne partners sit down with entrepreneur, former banker, and ministry founder **Rick Boxx** to talk about the Great Wealth Transfer, integrating faith and work, and what it means to steward a business through succession, with a kingdom mindset. They explore the emotional and spiritual side of exits, generosity, and calling alongside the practical realities of planning.



Featuring:
John Christensen
Cameron Bond

Guest:
Rick Boxx

Faith At Work

- Rick founded and leads the Unconventional Business Network, and helps business leaders **integrate Biblical principles into everyday decisions and culture.**
- He describes the Bible as "the best business book you'll ever get your hands on" when read through a business lens.
- Rick cites Barna Group research showing only about **28% of Christians integrate their faith at work**, while the rest compartmentalize or stand on the sidelines.

Planning for Life After the Deal

- Owners frequently invest years crafting a great business succession plan, yet fail to plan for their personal next chapter.
- Rick shares about a friend who transitioned his company beautifully, then realized, "The phone no longer rings" and he had no sense of what God had for him next.
- **Healthy succession planning includes a plan for personal purpose, calling, and community engagement** post exit, not just a liquidity event.

Succession Beyond the Numbers

- Rick reminds business owners that their company is "their baby," so the first offer often feels offensive, even if it is objectively fair.
- **Succession decisions are rarely just technical.** Unresolved family dynamics, guilt about treating children "equally" and conflicting desires can derail good plans.
- John shares examples of farm families and closely held businesses where **illiquidity, sibling expectations, and different callings create real tension within families and the successor generation,** especially if plans are unclear.

The Great Wealth Transfer

- **A massive transition of businesses and wealth is underway,** but it's moving slower than once predicted because many business owners are delaying retirement.
- Business owners often feel overwhelmed by the number of advisors required, legal, financial, tax, and even counselors and often do not know where to start.
- For many business owners, their **identity is often deeply tied to their business, which makes the idea of a sale or succession emotionally difficult,** not just financially complex.
- **The earlier a business owner engages in strategic planning, the more likely they will have a successful transition** and maximize the benefits for the business they built and the family they love.

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Kingdom-Minded Transitions

- Rick encourages business owners to **remember that God owns it all,** and they are really just stewards of the business.
- A kingdom-minded transition asks, “Who should I sell to? What will happen to my people, culture and impact after I am gone, and would God be pleased with that outcome?”
- Growing Christian-led private equity, ESOP advisors, and family offices can create options that honor both enterprise value and a faith-based culture.

Generosity & Kingdom Impact

- Many successful business owners Rick and StoryOne know are remarkably generous, **using liquidity events and exits to bless churches, ministries, and their communities.**
- Rick tells how an estate planning attorney never even asked about generosity, which showed him how often charitable intent gets left out unless someone raises it.
- **Donor-advised funds** and other tools **can weave generosity into succession,** sometimes using closely-held business interests as part of the charitable strategy.

Notable Quotes

"Read the Bible through the lens of a businessperson. It's the best business book you'll ever get your hands on."
-Rick Boxx

"God owns it all, and if that's true, then God owns your business. How do you really want to navigate this?”
-Rick Boxx

"If I'm truly a shepherd over my people, how good of a shepherd am I if I sell to someone who will gut the culture?"
-Rick Boxx

Notes:

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