Episode 8:

Why Story Matters in Estate Planning

StoryLens Podcast One-Sheet Snapshot

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In this episode, the StoryOne partners sit down with Jon Daugharthy to explore why estate planning is never just about documents. Through Jon's personal journey, they examine how faith, family dynamics, hardship, and community shape the way advisors serve families well. The conversation highlights why understanding story is essential to stewardship, trust and the lasting messages we leave behind.



Featuring:
Jon Daugharthy
John Christensen
Cameron Bond

Story Before Strategy

- Estate planning is not purely technical.
- Understanding family history, values, and relationships is critical before structures are built.
- Story provides context for decisions that documents cannot capture.

The Role of Community

- Major decisions should not be made in isolation.
- Trusted counsel helps reveal blind spots and align decisions with long-term values.
- Community supports clarity, accountability and wise stewardship.

Formed by Experience

- Jon's upbringing in a small family business shaped his view of service, integrity, and stewardship.
- Personal hardship deepened empathy and the ability to walk with others through difficult seasons.
- Advisors are shaped as much by lived experience as professional training.

Planning as Stewardship

- Estate planning is forward looking, guiding families through transitions they may face only once.
- The goal is not just efficiency but peace of mind and alignment with purpose.
- True stewardship considers both financial outcomes and relational impact.

The Emotional Side of Planning

- Estate planning often brings hidden family dynamics to the surface.
- Legal documents can reveal unresolved relationships and unspoken expectations.
- Thoughtful planning can reduce future harm, even when relationships cannot be fixed.

Notable Quotes

"Estate planning is often the last message someone leaves behind. That deserves careful thought."
-Jon Daugharthy

"Good planning starts with listening before it ever moves to strategy."
-John Christensen

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