C12 INTEL REPORT

Layne Hoekema

SNAPSHOT

LinkedIn: linkedin.com/in/layne-hoekema-4080305/   Business Website: https://www.bluetrust.com/advisor/layne-d-hoekema/   Valence Bias: Uncle Ron

Senior Private Wealth Advisor & Senior Partner at Blue Trust (Indianapolis office, with the firm since early 2000s).

Industry: Faith-based Wealth Management | Employees: 200–500 (est.) | Revenue: $50–250M (est.) | Website: https://www.bluetrust.com

Married to Sarah; they live in Fishers, Indiana, and are raising four children, including at least one currently excelling at Hope College.

Affiliations: Blue Trust (Senior Partner); Kingdom Advisors; Heritage Christian School (volunteer/SGO educator); The Oaks Academy (former board/Finance Committee); Beck Foundation Inc. (board/finance role); Trinity Christian College (donor/alumnus).

ROCHAMBEAU: Builder

Across his career, Layne has moved from technical accounting into building a long-term advisory practice and local office within a faith-based wealth firm. His pattern is not starting companies from scratch but steadily growing a client base, team influence, and community footprint around a clear biblical-stewardship thesis—classic Builder energy expressed inside an established platform.

STAGE: Lift - Middle

He appears to be in mid-career, with more than two decades of professional experience and many years at Blue Trust, now in a Senior Partner role. The business model is stable and proven; his public focus is on legacy, generosity, Christian education, and community impact rather than survival or exit, which fits a Lift–Middle season where questions center on faithful scale and long-term stewardship.

BUSINESS STORY

Seasoned faith-based wealth advisor stewarding a mature Indianapolis practice inside Blue Trust's biblically grounded platform.

Blue Trust (formerly Ronald Blue Trust) is a long-standing Christian wealth management firm founded in 1971 that applies "biblical wisdom and technical expertise" to financial planning and investment management. Layne leads as a Senior Private Wealth Advisor and Senior Partner in the Indianapolis office, serving high-capacity families with a strong emphasis on stewardship, generosity, and legacy.

"Layne is a senior private wealth advisor and senior partner in the Indianapolis office of Blue Trust. With over 20 years of experience… Layne and his team use biblical wisdom and technical expertise to help clients make wise financial decisions." (Blue Trust advisor bio, more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

His professional arc runs from municipal and nonprofit auditing (Pandolfi, Topolski, Weiss & Co.) and financial planning at Ogrizovich Financial Management into explicitly faith-integrated advising at Ronald Blue Trust/Blue Trust. That pivot from conventional CPA work to a Christian advisory firm appears to be a key vocational crossroads where he aligned his technical training with a biblical calling.

Paraphrase from his bio and LinkedIn: After graduating with high honors in accountancy from Trinity Christian College and passing the CPA exam, Layne worked in public accounting and financial planning before joining Ronald Blue & Co. (now Blue Trust), where he could intentionally combine his faith and financial expertise. (more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

Blue Trust itself has grown organically over decades, rebranding from Ronald Blue Trust to Blue Trust while maintaining independence and its Christian identity. Advisors like Layne represent the firm's model: long-tenured partners embedded in local Christian communities, building deep relationships rather than chasing rapid transactional growth.

Paraphrase from Blue Trust site: Founded in 1971, Blue Trust is a national firm that "offers financial planning and investment management from a biblical worldview," serving clients across the U.S. through local offices like Indianapolis. (more:

https://www.bluetrust.com)

Navigating wealth management in a competitive, regulated, and increasingly values-fragmented financial marketplace.

As a regional office leader in wealth management, Layne operates amid market volatility, regulatory complexity, and competition from large integrated financial institutions and robo-advisors. Blue Trust differentiates by explicit faith integration—helping clients treat wealth as stewardship rather than entitlement—which both narrows the audience and deepens loyalty with like-minded families.

Citizen 7 Indy described an event featuring Layne as addressing “money, faith, generosity, and legacy,” promising “timeless Biblical wisdom on money, generosity, and purpose.” (Citizen 7 Indy event page, more: https://citizen7indy.com/news/tpost/44munbx2b1-coffee-amp-connection-money-talk)

Within Indianapolis, his practice also intersects with Christian education and philanthropic ecosystems, advising donors and boards on tools like Indiana’s Scholarship Granting Organization (SGO) tax credits. Heritage Christian School, for example, relies on his expertise to help families and donors structure giving in tax-efficient, kingdom-aligned ways.

On Heritage Christian’s SGO FAQ page, Layne is cited as a resource explaining that Indiana’s SGO program “offers a tax credit of 50% of the amount donated” while supporting scholarships, helping donors maximize generosity. (Heritage Christian School SGO FAQ, more: https://www.heritagechristian.net/support/sgo/faqs)

His business story is less about founding something new and more about faithfully expanding an entrusted territory—growing a stable book of multi-generational client relationships, shaping how Christian families in central Indiana think about wealth, and helping institutions like schools and foundations steward resources wisely.

“His passion is to see his clients use their platform of influence to bring glory to their Maker.” (Blue Trust advisor bio, more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

The character of the firm—steady, biblically anchored, relationally long-term—mirrors Layne's own pattern of patient, convictional building rather than high-drama entrepreneurial swings.

STEWARDSHIP STORY

Whole-life stewardship: financial counsel as discipleship, plus deep investment in Christian education and local philanthropy.

Layne's day job is itself a stewardship ministry: he helps clients see wealth as a platform "to bring glory to their Maker," guiding decisions about generosity, legacy, and multi-generational planning. His membership in Kingdom Advisors signals that he views advising as a calling to disciple hearts, not just manage assets.

"Layne's passion is to see his clients use their platform of influence to bring glory to their Maker." (Blue Trust advisor bio; he is also noted as a member of Kingdom Advisors, a national network of Christian financial professionals. More: https://www.bluetrust.com/advisor/layne-d-hoekema/)

He and Sarah actively support Christian education, with documented involvement at Heritage Christian School (including helping explain and promote SGO giving) and past service on The Oaks Academy's board and Finance Committee. These roles put him in the engine room of budgets, tuition assistance, and access for less-resourced families.

Heritage Christian School lists Layne among those who help donors understand Indiana's SGO program, which "provides scholarship support to eligible students" and offers significant tax credits, positioning generosity as a tool for access and discipleship. (Heritage Christian SGO FAQ, more: https://www.heritagechristian.net/support/sgo/faqs)

He is also connected to the Beck Foundation Inc., a private foundation focusing on Christian and educational causes, where public records associate him with finance or board roles. Combined with donor recognition at Trinity Christian College, this shows him giving both professional expertise and personal resources to institutions shaping the next generation.

Paraphrase from Grantable/Beck Foundation profile: Beck Foundation Inc. is a U.S. foundation with Christian and educational giving priorities; filings list Layne D. Hoekema among its officers/directors, indicating direct involvement in grantmaking stewardship. (more:

https://www.grantable.co/search/funders/profile/beck-foundation-inc-us-foundation-352052617)

Building a multi-generational legacy of faith, education, and generosity rooted in his own family story.

Layne's alma mater, Trinity Christian College, publicly lists Layne and Sarah among donors in its annual report, reflecting a desire to pour back into the institution that formed him. At home, one child's repeated placement on Hope College's dean's list suggests that the family culture he and Sarah cultivate prizes diligence and calling as much as financial success.

Trinity Christian College's 2016–2017 annual report includes "Layne and Sarah Hoekema" among its donor listings, underscoring their ongoing support of Christian higher education. (Trinity Christian College annual report, more: https://www.trnty.edu/about-us/annual-report-2016-2017/)

He stays rooted in local church life, participating in an accountability and Bible study group, which suggests he seeks to steward his own heart and character under spiritual authority even as he stewards others' resources. That quiet submission to community is a key indicator that his generosity flows from discipleship rather than philanthropy-as-branding.

Paraphrase from Blue Trust bio and related notes: Layne is active in his local church, where he participates in both an accountability group and a Bible study group, reflecting his desire for spiritual community and personal growth. (more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

Speaking roles like Citizen 7 Indy's "Money Talk" event further show him giving time and voice to help the broader marketplace wrestle with money, faith, and purpose—not just his own client list. His stewardship lane is less about public philanthropy headlines and more about forming how hundreds of families, students, and givers understand their call with money.

Citizen 7 Indy promoted its Coffee & Connection: Money Talk with Layne as offering "Biblical insight" and "timeless wisdom on money, generosity, and purpose" for attendees navigating financial questions. (Citizen 7 Indy event page, more: https://citizen7indy.com/news/tpost/44munbx2b1-coffee-amp-connection-money-talk)

Through boardrooms, classrooms, pulpits, and living rooms, Layne is modeling a quiet, consistent life where money is a means to form people and institutions in the way of Jesus.

WHY C12 PEERS WANT Layne Hoekema

Faith-integrated senior advisor who brings seasoned stewardship wisdom and a calm, convictional presence to peers.

Layne has lived for years at the intersection of technical complexity and spiritual formation—walking with affluent families through planning, conflict, and legacy conversations framed by Scripture. That experience translates well into a C12 room where leaders need someone who can name financial realities while still asking, “What would faithfulness look like here?”

“With over 20 years of experience in financial planning and investment management, Layne and his team use biblical wisdom and technical expertise to help clients make wise financial decisions.” (Blue Trust advisor bio, more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

His roles with The Oaks Academy, Heritage Christian School, and Beck Foundation show he can operate inside complex governance and budget environments without losing sight of mission. Other members wrestling with boards, foundations, or school partnerships would likely find in him a thoughtful sounding board rather than a simplistic cheerleader.

Paraphrase from public records: Layne has served on The Oaks Academy’s board and Finance Committee and as an officer/director with Beck Foundation Inc., bringing financial oversight and stewardship perspective to Christian educational and philanthropic organizations. (more: organization and foundation disclosures)

Because he participates in accountability and Bible study groups and speaks at events like Citizen 7 Indy’s Money Talk, he is already practiced at peer dialogue, gentle transparency, and teaching in community. That history suggests he won’t dominate a room but will contribute weighty, scripture-rooted input when invited.

Citizen 7 Indy framed his session as a “conversation” with attendees around money, faith, and legacy, not a one-way lecture, hinting at his interactive and humble posture with peers. (Citizen 7 Indy event page, more: https://citizen7indy.com/news/tpost/44munbx2b1-coffee-amp-connection-money-talk)

A steady, values-forward listener who can normalize conviction without sacrificing relationship.

Layne's visible pattern is Faithful Tension: he holds strong biblical convictions around money, while remaining embedded in diverse school communities and donor circles where not everyone shares all his assumptions. In a C12 circle, that equips him to speak truth without needing everyone to agree immediately—a stabilizing force.

"His passion is to see his clients use their platform of influence to bring glory to their Maker." (Blue Trust advisor bio, more: https://www.bluetrust.com/advisor/layne-d-hoekema/)

Because he is not a founder fighting for survival, he brings a different voice: how to steward an entrusted platform faithfully over decades, and how to leverage stability for kingdom impact. That can gently reframe the perspective of more frenetic entrepreneurs in the room.

Paraphrase from firm history: Blue Trust, founded in 1971, has emphasized long-term relationships and biblically based counsel rather than aggressive, high-turnover growth, mirroring the seasoned, steady posture Layne carries. (more: https://www.bluetrust.com)

He is likely to be especially helpful to peers wrestling with generosity, family wealth conversations, school and church partnerships, and how to navigate financial complexity without compromising conscience.

Heritage Christian School's use of Layne's expertise on SGO tax credit giving shows how he helps others simplify complex financial tools for kingdom purposes—a pattern he can bring into peer discussions. (Heritage Christian SGO FAQ, more: https://www.heritagechristian.net/support/sgo/faqs)

In a C12 group, Layne would most often be the one who quietly listens, then asks the clarifying stewardship question that helps the room see both financial and spiritual implications more clearly.

KINGDOM QUESTIONS

Living at the seam of money, discipleship, and legacy in the Midwest church and marketplace.

When did it first become clear to you that financial advising could be a ministry calling, not just a career—and what shifted in you at that point?

Can you tell the story of a client or family decision that deeply affected you spiritually, for better or for worse?

How do you personally stay tender before the Lord when you spend so much of your week around wealth, planning, and control?

Helping a generation of Christian families and institutions in Indiana hold wealth loosely and mission tightly.

Looking at central Indiana, where do you see money most clearly distorting calling—and where have you seen the gospel redeem that?

You’ve invested heavily in Christian education; what do you hope students and young professionals in your city understand about stewardship that your generation often missed?

If every CEO and pastor you work with could internalize one biblical principle about wealth and legacy, which would it be and how have you watched it play out over time?

He carries the kind of seasoned, Bible-soaked stewardship wisdom that can gently recalibrate how leaders think about money, power, and generational impact.

COHORT FIT GUIDANCE

Cohort Type Fit

W-2 Executive Cohort

Layne is a Senior Partner and Senior Private Wealth Advisor within Blue Trust rather than a founder/owner, operating with significant responsibility and influence but inside a larger organizational structure. His sphere centers on client relationships, local-office leadership, and board/committee work rather than P&L for a standalone enterprise, making a W-2 Executive cohort the cleanest fit.

Cohort Positioning (1–12)

Anchor / Strengthener (seats 4–7)

Given his Lift–Middle stage, long tenure, and integrated faith/practice, he's less of a pioneer and more of a stabilizing presence once a group's core identity is formed. He can help anchor spiritual tone and stewardship themes while strengthening newer or more entrepreneurial members who need a calm, convictional peer to process complex financial and legacy issues.

OUTLIER NOTES

Faith-based senior wealth advisor, Deep Christian education and foundation involvement

Not every member will have spent decades in explicitly Christian financial counseling, so his default language and frameworks may feel unusually biblically direct around money. A Chair can lean into that as a gift while being mindful that his influence may carry extra weight in conversations about generosity, succession, and personal wealth.

REMINDERS AND PREP NOTES

Do / Avoid Recommendations

Effective conversational levers:

Ask about his pivot from public accounting into Ronald Blue/Blue Trust and how he discerned that move. Invite stories of specific clients or school partnerships where he saw God use financial planning for spiritual transformation. Draw him out on what he's learning raising four kids, including one thriving at Hope College, and how that informs his view of legacy. Explore how he's experienced God in his accountability group and church community in this season.

Pitfalls to avoid:

Don't treat him primarily as a "money guy" or potential donor; approach him as a disciple-maker whose tool happens to be finance. Avoid rushing to quick conclusions on contested financial or theological topics—he seems to appreciate careful, biblically grounded reasoning. Be cautious about framing C12 as just another networking or referral environment; emphasize formation over deal flow. Don't trivialize the weight he carries with clients and boards by over-spiritualizing or offering pat answers to complex stewardship dilemmas.

Helpful follow-up content:

Consider sending resources on integrating faith and work at a senior executive level, not just for founders. Share C12 content or stories around biblical generosity, family discipleship with wealth, and stewarding influence in Christian education or philanthropy. If appropriate, introduce him to other C12 members who serve on Christian school boards or foundations, or to peers who lead faith-based financial or professional services firms.

Tone and posture that build trust:

Show up steady, unhurried, and well-prepared; he will likely respond to thoughtful questions more than energetic pitches. Honor the seriousness with which he approaches scripture and stewardship, and be comfortable sitting in tension without forcing quick resolution. Let him see that you care about his heart and family as much as his client roster or board seats.

Chair ~ Type Guidance

If you're a Builder engaging them…

If you're a Builder, connect with Layne around what you're each trying to build in this season—hearts, systems, and communities, not just revenue. Share some of your own crucible moments where God redirected how you see success, and invite his stories from client work or board service. Engage him on how he thinks about scale in a realm (wealth management) where bigger isn't always better, and ask what "enough" looks like for him and his clients.

If you're an Operator engaging them…

If you're an Operator, draw him out on how he maintains process excellence and regulatory integrity inside a values-driven firm. Trade practical stories about building margin—for clients and for yourselves—so that generosity and sabbath are possible in high-responsibility roles. Ask how he protects his soul from both cynicism and naïveté when constantly dealing with money, risk, and future planning.

If you're an Architect engaging them…

If you're an Architect, invite him to reflect on the design of Blue Trust's discipleship-through-advising model and how it shapes client behavior over decades. Explore how he thinks about structuring legacy—trusts, giving plans, board roles—so they form character rather than entitlement in the next generation. Ask what kind of Christian financial culture he hopes exists in Indianapolis ten years from now and how God might be using him to design for that.

FROM THE CUTTING ROOM FLOOR

This Intel process follows a templated approach, and sometimes great stories or lingering questions don't get addressed thoroughly. Here are the extra pieces that deserve space but didn't fit into the template.

- Ask about the early vocational pivot from auditing municipalities/nonprofits and doing traditional planning work to joining Ronald Blue/Blue Trust—what convinced him to move from "neutral" accounting into explicitly biblical advising, and what pushback or confirmation he experienced.
- Ask about his time on The Oaks Academy's board and Finance Committee in Indianapolis: what financial or missional tensions those schools face, and a moment there when he sensed God's clear leading around a hard decision.
- Ask about his involvement with Heritage Christian School's SGO efforts—how he's seen tax-credit tools open doors for kids who otherwise couldn't attend, and how that's shaped his view of public policy and generosity working together. (more: https://www.heritagechristian.net/support/sgo/faqs)
- Ask about the Beck Foundation Inc.: what kinds of causes it prioritizes, how he approaches discernment in grantmaking, and a story of a grant that particularly encouraged him. (foundation profile: https://www.grantable.co/search/funders/profile/beck-foundation-inc-us-foundation-352052617)
- Ask about his family's connection to Christian higher education—Trinity Christian (his alma mater) and Hope College (where his child is on the dean's list)—and how he thinks about forming his kids to carry both faith and financial responsibility. (Trinity donor listing: https://www.trnty.edu/about-us/annual-report-2016-2017/)
- Ask about the Citizen 7 Indy "Money Talk" event: what questions attendees asked that surprised him, and whether anything from that conversation has stayed with him as a word from the Lord about this cultural moment. (event description: https://citizen7indy.com/news/tpost/44munbx2b1-coffee-amp-connection-money-talk)
- Watch for whether he feels more like a pastor to wealthy families than a typical financial advisor, and whether there is any weariness or loneliness in carrying others' complex stories and secrets over long periods.
- Watch for how he holds tension between strong biblical convictions around stewardship and the pluralism of school boards, donor circles, and client environments—there may be live questions about when to speak prophetically and when to patiently endure.

- Watch for any sense that his board and ministry load (schools, foundation, church, clients, family) may be stretching him thin; a C12 cohort could provide both permission and wisdom around pruning commitments in order to deepen impact.

- Watch for emerging succession questions: as a long-tenured senior partner in a relationship-driven firm, he may be thinking quietly about how to hand clients, community roles, and family legacy to the next generation without losing the biblical DNA.

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