



THE **OCHappenings**



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Internal Updates

Employee News



Brittany Elliot moved to the IT Department as a Business Systems Analyst



Debbie Moritz moved to Customer Service as an Insurance Specialist



Welcome, Lisa Weinmann, Collections Specialist (MN)

Marketing

Don't forget! The [Marketing Repository](#) is available for everyone to access and includes an updated Organizational Chart.



HR Updates

CPR Training Schedule

- MN: May 9 (completed)
- PA: June 11 at 9am

Please contact Paris Ellingson (PEllingson@OakmontFinance.com) with any HR-related questions.



JA Mitsui is visiting the PA office on **June 3rd**. We're looking forward to welcoming our guests to our office and introducing them to the PA-based team (with some MN guests). Be sure to practice your pronunciation of Kon'nichiwa (hello).

Monthly Report: April 2025

CREDIT APPS	The credit team reviewed 1,167 apps . Daily average of 53 apps .
SETS SENT OUT	The docs team sent out 667 sets . YOY Increase: 90%
TITLES PROCESSED	Sent 240 titles for processing. Received 257 completed Titles/ELTs.
DOCS CHECKED IN	Funding checked in 652 sets of docs for an average of 30 sets a day.
DEALS	666 deals funded for \$58,117,712.41
WORKING CAPITAL	Working Capital: \$495,000 funded for \$26,450 in fees
FISCAL YTD	5653 deals for \$474MM Avg ticket size is \$83.9k (Excludes Working Capital deals)

May & June Birthdays

Mikki Henkelman – May 2
 Brittany Loehning – May 8
 Jenn Krantz – May 12
 Romeo Mouk – May 13
 Hailey Nathe – May 26
 Sara Revermann – May 27
 Morgan Davis – May 30
 Jacki Thielen – May 31

Michael McElroy – June 3
 Elise Linn – June 5
 Lisa Weinmann – June 13
 Kendra Austing – June 17
 Austin Borgerding – June 18
 Trista Strangler – June 24
 Sara Birr – June 27

May & June Work Anniversaries

Maddie Moynihan – 1 year
 Brittany Loehning – 1 year
 Sara Revermann – 2 years
 Hailey Nathe – 3 years
 Molly Sand – 7 years
 Chad Primus – 7 years
 Jayme Gerads – 7 years
 Elise Linn – 7 years

Tracey Elfering – 7 years
 Daryn Lecy – 7 years
 Michael McElroy – 7 years
 Jim Peach – 7 years
 Mikki Henkelman – 7 years
 Amanda Bialka – 5 years
 Missy Koltes – 4 years
 Brooke Poepping – 2 years
 Brittany Elliot – 1 year



Happy Birthday & Congratulations!

Fun Enforcers

Marketing went bowling:

The Marketing Team celebrated a successful tradeshow season with some team building, bowling style.



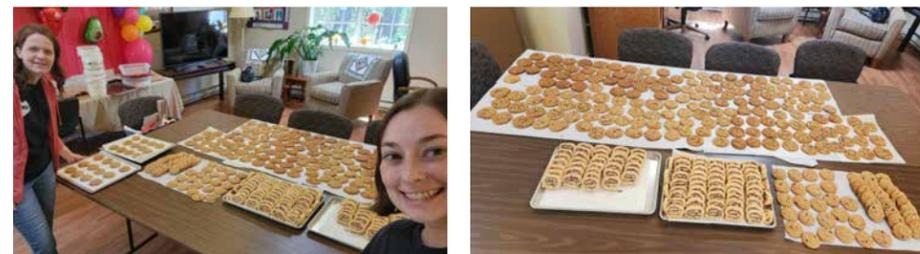
Mikki's 40th Birthday

Happy Birthday to Mikki, who is now part of the 40-year-olders club (no information is available as to who else has already been inducted from OCS 😊).



OCS Cares

The Minnesota team, including Deb Reber and Kendra Kalthoff, used their baking skills to provide homemade goodies to the residents of Quiet Oaks.



Perfect Match Trivia Winner

Congratulations to Paris Ellingson, winner of last month's trivia game.

Employee Spotlight: Joe Smith



Joe Smith
IT Security Analyst
(PA)

How long have you been a member of team OCS?

5 months

Do you have a specific memory from your time with the company that makes you smile?

I can't think of anything specific, but I smile and laugh every day I'm at work.

What is something you've been working to accomplish outside of work?

Does it have to be a fun something? Getting a house ready to sell...

What would you do if you won the lottery? (Answer each below)

- Pay off everything!
- Buy something ridiculous, like a dancing robot.
- Invest in a wealth manager to do my investing.
- Buy a beach house somewhere tropical.

If you had a time machine, would you go back in time or into the future? What would you do when you got to your destination?

I would go to the past and make sure George and Lorraine meet at the Enchantment Under the Sea dance at Hill Valley High.



If you had to eat one meal for the rest of your life, what would it be? And yes – you can only choose one!

Medium-Rare Steak with a fluffy baked potato and garlic bread.

Are you currently reading any books?

Shogun by James Clavell.

Bingeing any shows?

Seal Team, but currently taking a break to finish up the first season of The Pitt.

What was your dream job when you were a kid?

I really wanted to be an astronaut!

Tell us about your family and any pets you have. What are you looking forward to the most between now and the end of 2025?

My wife, Danielle, and I are about to celebrate our 15th anniversary. We have two miniature dachshunds: Indiana and Ziva, and two cats: Chloe and Punkin. I don't know if it's what I'm MOST looking forward to, but I am ready for football to come back!



Do you want to be featured in an upcoming OCS Employee Spotlight? Email Marketing@OakmontFinance.com to help your dream come true!



With warmer weather approaching,
it's that time of year for vacations!
Please share your summer vacation
(or staycation) photos, including the
location, and we'll feature them in an
upcoming newsletter issue!
Email Marketing@OakmontFinance.com

Have something you'd like
to include in the next issue?

Send it to
Marketing@OakmontFinance.com by June 16