

THE **OCHappenings**



Table of Contents

Caring Without Compromise: How One Benefit Is Changing the Way OCS Supports Families.....	2
Internal Updates.....	4
Monthly Report: June 2025.....	5
August Birthdays.....	6
August Anniversaries.....	6
Out & About.....	7
Fun Enforcers.....	8
Perfect Match Trivia Winner.....	9
Summer Vacation Photos.....	9

Caring Without Compromise: How One Benefit Is Changing the Way OCS Supports Families

By Alyson Och and Madelyn Moynihan

Since its launch in 2023, OCS's Parental Care Leave has empowered employees to show up for their families in powerful, personal ways. As our OCS Family continues to grow, it's time to revisit the heart behind this benefit—and how it's positively impacting lives.



What is Parental Care Leave?

OCS offers its employees the Parental Care Leave benefit, which is up to 40 hours of paid time off each fiscal year (April 1 to March 31) to care for a parent/family member facing injury or illness. This policy has proven to be both practical and deeply meaningful for employees who have faced the responsibility of caring for a loved one while working full-time.



Parental Care Leave reflects OCS's belief that life's meaningful moments—such as supporting a parent or accompanying a loved one to treatment—deserve time, dignity, and understanding. It's not just time off; it's time well spent." Daryn Lecy, SVP and COO

One of OCS' Credit Analysts, **Alyson Och**, utilized this benefit this year to care for her grandparents. By coordinating time off through a simple process, she was able to step in and provide consistent support for medical appointments. The result? A stronger connection with her grandparents, peace of mind for their family, and a profound appreciation for a benefit that honors the importance of caregiving.

Parental Care Leave in Action

Alyson shared that taking her grandparents to and from necessary medical appointments was getting difficult for family members. Her mother and siblings were taking vacation time from work, which was depleting their PTO, and her grandparents were frustrated with trying to coordinate transportation among various family members. That's when Alyson stepped in, using OCS' Parental Care Leave benefit.

We asked Alyson to share her insights into the ease of requesting the benefit, how she utilized it, and what it means to her.

What was the request process for utilizing the Parental Care Leave benefit?

Whenever I needed to take time off for my grandparents' appointments, I would check in with my manager (Clay Fischer) and ask for time off under Parental Care Leave. I would also check the OCS calendar before requested time off to see if anyone else is off on those days to help manage team coverage.

How satisfied are you with the Parental Care Leave support provided by OCS?

I am very satisfied with the Parental Care Leave.

Were any aspects of the Parental Care Leave process challenging?

No.

Why is this a great benefit?

It allows us to give back to the people who raised and/or helped raise us. Our parents/grandparents aren't able to do everything they used to anymore, so being able to help in this way is huge, and it means a lot to them.

What have you gained from this benefit?

My grandpa went completely blind about 6 years ago, and my grandma isn't comfortable driving in highly populated areas anymore. My ability to use Parental Care Leave to get my grandparents to and from appointments has not only put them at ease but has also put our family at ease, knowing that there is one person with the availability and resources to take them to their appointments as needed.

I have developed a closer relationship with my grandparents and have come to know them much better as a result. I've learned more about our family history, which has been both interesting and enjoyable to discover. It's unbelievable how much isn't discussed on a regular basis during family events or other times spent together!

My grandpa is a talker/storyteller, so the more time I spend with him, the more I learn about his life and experiences. My grandma, on the other hand, is quieter unless you get her away from my grandpa or if he isn't listening/can't hear. He has hearing aids, but doesn't always wear them, and usually sits in the back seat, so he can't hear us very well when we're talking up front. Oftentimes, he'll take a nap, so my grandma and I get a chance to speak one-on-one, which I've also really enjoyed. I think I've talked to my grandma more now than I ever have before, because she's usually by my grandpa's side, even before he went blind, and he has plenty to say for both of them.



I wish I could've gotten this time with my other grandpa, who has been gone now for over 13 years, so to be able to spend this time with them has been an absolute blessing. I'm beyond grateful for the opportunities OCS and the Parental Care Leave have given me." Alyson Och, Credit Analyst

The Parental Care Leave benefit has proven to be more than just a policy; it's a meaningful support system that allows employees to care for their loved ones. It supports team members in balancing work and family responsibilities.

For Alyson, it has provided not only the flexibility to assist her grandparents but also the opportunity to deepen their relationship. The process was simple, and those who use this benefit are appreciative that OCS offers it.

Thinking about using Parental Care Leave?

Talk with your manager or email OCSSHR@oakmontfinance.com to explore how it can support your caregiving journey.

Internal Updates

Welcome



Katelyn Walls, Business Development Officer

June 25, 2025: A record-setting day for new credit applications

The credit team reached
74 TOTAL APPS
 surpassing their prior record of 73!

Approved
52 APPS
 80% approval, apps with decisions

Doc Prep/Docs Sent/Docs Reviewed:
11 APPS + 1 FUNDED
 23% of approvals



Marketing updates

Just a reminder that we have OCS-branded designs in place for the following, with instructions:

1. [LinkedIn background](#)
2. Teams background: Here's the link for changing the background: [TeamsBackgroundHowTo.docx](#)

Questions? Contact marketing@oakmontfinance.com for assistance.



Employee News

It's a Boy!

Kendra and her husband Zach welcomed their beautiful son, Fredrick Daniel, on July 23rd.



Monthly Report: June 2025

CREDIT APPS	The credit team reviewed 1,067 apps . Daily average of 51 apps .
SETS SENT OUT	The docs team sent out 644 sets . YOY Increase: 55%
TITLES PROCESSED	Sent 190 titles for processing. Received 263 completed Titles/ELTs.
DOCS CHECKED IN	Funding checked in 654 sets of docs for an average of 31 sets a day.
DEALS	633 deals funded for \$56,600.000
WORKING CAPITAL	Working Capital: \$463,912 funded for \$24,000 in fee income
FISCAL YTD	1886 deals for \$166.33MM Avg ticket size is \$88.2k (Excludes Working Capital deals)

Happy Birthday & Congratulations!

August Birthdays

Tammy Crozier – August 1st

Tiffany Scott – August 9th

Tabitha Renneker – August 13th

Alicia Moening – August 15th

Mindy Lund – August 16th

August Anniversaries

Keara Piekanski – 7 years

Tracey Schneider – 5 years

Alyson Och – 4 years

Sara Birr – 4 years

Debbie Waldron – 3 years

Virette Speid – 2 years

Isaac Nett – 1 year



Out & About

Converge

Daryn Lecy, SVP and COO, was invited to join the Converge Virtual Experience event hosted by the Monitor as a facilitator. Along with 16 other leaders in the equipment finance industry, he shared best practices for capturing the "future equipment finance customer."



Power of People Summit

Keara M. Piekanski, VP of Marketing and Communications, and **Tracey Elfering**, Documentation and Titling Manager, travelled to Baltimore, MD, to participate in The Equipment Leasing and Finance Association's inaugural event, the Power of People Summit.





Fun Enforcers

BBQ and Cornhole (PA)

How do you celebrate Independence Day in place where it all began? With a cookout and cornhole, of course! Thanks to Joe Smith and the Party Planning Committee for organizing a delicious taco lunch. Thanks also to our Cornhole tournament participants and John Williams for his (intense) leadership of said competition.

The winners were **John Williams** and **Maddie Moynihan!**



Bill Chandlee's did not win, and he lodged several complaints (although we're not sure anyone was listening).

Keara Piekanski's team also did not win, and she will no longer approve John or Maddie's PTO requests.



Perfect Match Trivia Winner

Congratulations to **Laura Salzl**, winner of last month's trivia.



Summer Vacation Photos

Jess Thompson, Funding Coordinator (PA), stayed in Big Sky Montana in June and visited Idaho and Wyoming. The blue geyser (solo pic and pic of Jess and Dan from up higher with it in the background) is The Grand Prismatic Spring in Yellowstone National Park in Wyoming. There is a photo of Old Faithful shooting, a pic of a baby grizzly, and the photo of Jess and Dan with the huge mountains in the background is Grand Teton National Park in Wyoming.



MN Ice cream

How does our Minnesota team cool down on a hot day? With ice cream and shaved ice brought directly to Shamrock Lane. Thanks to the Wandering Cow ice cream truck for delivering tasty treats to our North Star State staff. Stay cool, team OCS!





Share your summer vacation
photos with us, and we'll
feature them in our
newsletter!

Email Marketing@OakmontFinance.com



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

Send it to
Marketing@OakmontFinance.com by July 18