

THE **OCHappenings**



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Internal Updates

Welcome

Jenny Ebensteiner, Operations Specialist



Marketing Updates:

Website launching

We have an updated launch date for the website: **September 4!** Once it's live, please check it out and let us know if you have any questions, concerns, or suggestions.



First Google Ads Deal Won!

Kudos to **John Williams** and the BDOs (**Andrew Halladay**, **Laurie Gill**, and **Danny Pistorio**) who assisted with our first paid Google Ads campaign. It has run for nearly 8 weeks, and we received our first closed deal in August, equaling \$8,311, which more than covered our budget for two months. We expect that this is just the beginning for online, inbound leads!



HR Update:

Update from July newsletter cover story. The incorrect timeframe for taking **Parental Care Leave** appeared. It should be January 1 – December 31 of each calendar year.



Congratulations OCS

We made the Inc. 5000 list of fastest growing companies in America again!

Oakmont Capital Services' Minnesota office has been officially named one of the Star Tribune's Top Workplaces 2025!



Congratulations Maria Zimny

Rayna Jane Zimny made her appearance on Friday at 11:01 am! She was 7 lbs 15 ounces and 19 inches.

Maria, Ethan, and Rayna are doing wonderfully!



Monthly Report: July 2025

CREDIT APPS	The credit team reviewed 1,066 apps Daily average of 48 apps
SETS SENT OUT	The docs team sent out 517 sets YOY Increase: 26%
TITLES PROCESSED	Sent 216 titles for processing Received 252 completed Titles/ELTs
DOCS CHECKED IN	Funding checked in 609 sets of docs for an average of 28 sets a day
DEALS	598 deals funded for \$51.5MM
WORKING CAPITAL	Working Capital: \$525K funded for \$24,500 in fee income
FISCAL YTD	2486 deals for \$217.97MM Avg ticket size is \$87.7k (Excludes Working Capital deals)

September Birthdays

Debbie Waldron – September 4
 Bethany Worms – September 7
 Maria Zimny – September 9
 Laurie Gill – September 10
 Nancy Pistorio – September 17
 Missy Koltas – September 18
 Danny Pistorio – September 22
 Amanda Bialka – September 24
 Virette Speid – September 30

September Anniversaries

Hailey Thill – 1 year
 Trevor Braegelmann – 1 year
 Stephanie Wentland – 3 years
 Trista Strangler – 5 years
 Sarah Olmscheid – 6 years



Happy Birthday & Congratulations!

Out & About: Fall Tradeshows



Fall tradeshows are on the horizon!
 Here's what's coming up next month:

FABTECH

September 8-11, Chicago, IL
 Attending are Mindy, Michael, and Tatum



FedEx Service Provider Summit

September 8-11, Orlando, FL
 Attending are Chad and Jayme



AED Women In Equipment Conference

September 17-19, Chicago, IL
 Attending are Elise and Molly



MAC Tools Show

September 19 –20, Indianapolis, IN
 Attending are D.J. and Kristy



Fun Enforcers

PA Coffee Truck

Coffee breaks at the PA office got a delicious upgrade in July!

Travelin' Tom's Coffee Truck brought some serious buzz to our month-end. While everyone had their own favorite flavor, we all agreed—it was the perfect way to celebrate another successful month at OCS!

MN – Albany Heritage Day Parade

Albany Heritage Day was a roaring success—and Oakmont Capital Services brought the jungle vibes!

Our Albany office went all-in for this year's "King of the Jungle" theme, with 20 team and family members marching proudly in the parade and handing out a wild haul of goodies, including:

-  1,200 slinging chickens
-  50 lbs of Tootsie Rolls
-  1,200 bouncy balls
-  37 lbs of Dubble Bubble
-  200 animal balloons

And guess what? By the end—not a single treat left behind!

Huge shoutout to our incredible team and the amazing Albany community for making the day unforgettable!

Albany & Avon Fire Department Golf Fundraiser

It's one of our favorite pastimes at OCS: golfing "fore" a cause!

We were proud to support the Albany & Avon (MN) Fire Department Golf Fundraiser—and even prouder of our team members who represented OCS on the green: **Clay Fischer, Michael McElroy, Mindy Lund, and Trevor Braegelmann.**

As Mindy put it, "It was a beautiful day for golf with some pretty awesome co-workers."



Perfect Match Trivia: Phillies vs. Twins

Answer this month's trivia for a chance to win an OCS apparel credit. Take a screenshot of your answers and email it to marketing@oakmontfinance.com.

As usual, this is the honor system – **no Googling!**

The Phillies and Twins will face off for 3 games from September 26th to the 28th. How well do you know the OCS hometeams?

1. What year were the Phillies established?

- 1881 1883 1885 1887

2. The Twins' original major league franchise (before moving to Minnesota) was founded when?

- 1897 1899 1901 1903

3. How many World Series Championships have the Phillies won?

- 1 2 3 4

4. How many World Series Championships has the Twins franchise won?

- 1 2 3 4

5. Who will score the first run of the first game?

- Phillies Twins

6. Who will win the series?

- Phillies Twins

7. Who will have more combined runs during the three game series?

- Phillies Twins

8. Who will have more combined home runs during the three game series?

- Phillies Twins



Did you know...

The **PHILLIES** are the oldest continuous, one-name, one-city franchise in all professional sports. The team began as the Philadelphia Quakers but quickly adopted the "Phillies" nickname after it first appeared in the Philadelphia Inquirer as a shortcut to save space.

The **TWINS** franchise began in 1894 as the minor league Kansas City Blues. The team relocated to Washington, D.C. to become the major league Washington Senators in [Answer to question #2 above]. The franchise moved to Minnesota for the 1961 season.

Employee Spotlight: Jessica Thompson



Jessica Thompson, Funding Coordinator (PA)

How long have you been a member of team OCS?

I've been with OCS for one year and one month.

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

There are far too many good memories to count. **Joe Smith, Bill Chandlee, Atown, George, Jen Foulds**...just some of the people that never fail to crack me up. We always joke that OCS' good HR is based in MN (Hi, **Paris!**), but truthfully, I just really love the people I work with. We get our work done at OCS, but we do it while forming great relationships.

Do you have any hidden talents?

I am only 4'10...not really hidden, but I will consider it a talent.

Do you have a nickname we don't know about? If so, what is it?

My closest friends and family call me "Jessie."

What is your animal counterpart?

My animal counterpart is a red panda: tiny, always giggling, snack-fueled, and powered by naps. I am an extroverted introvert.



Are you currently reading any books?

I'm currently reading "The Guest List" by Lucy Foley. This is the eighth book I have read this year, and my goal is to read 18 books.

Bingeing any shows?

Currently I am watching The Lincoln Lawyer on Netflix. I love watching TV, especially anything written by Taylor Sheridan!



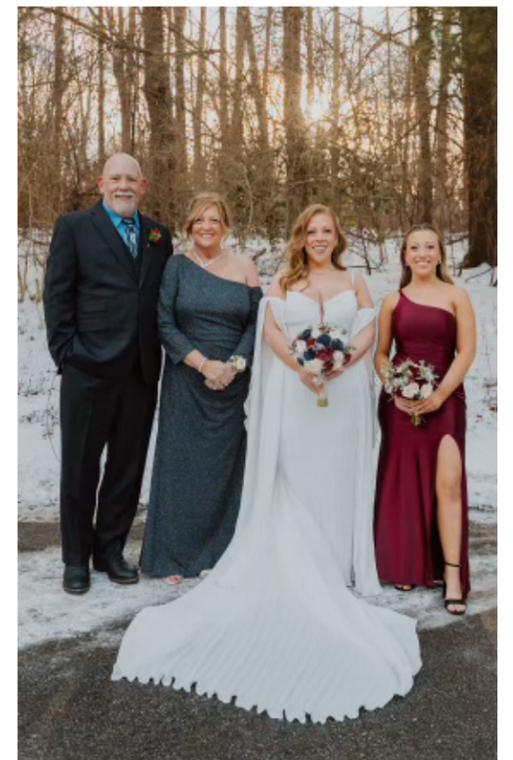
What song do you have to dance to when you hear it?

Honestly, if you work near me in the PA office, you've probably seen me swaying, tapping, dancing to whatever song is playing. I'll dance to whatever has a beat; it could be AC/DC, it could be a microwave beeping. I don't discriminate.



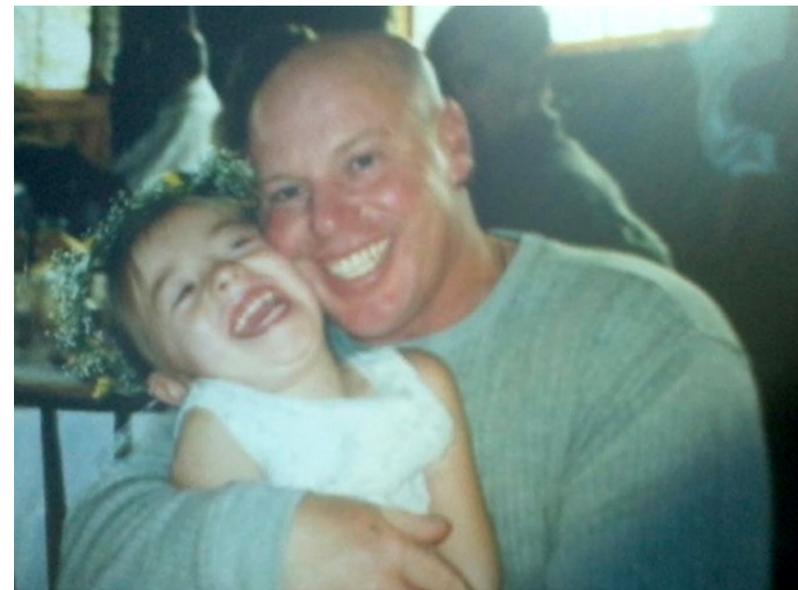
What was your dream job when you were a kid?

When I was a kid, I wanted to be a teacher, and I got to be! Right after college, I taught 7th and 10th grade English for a little over a year. I also spent time teaching life skills to students with autism.



Tell us about your family and any pets you have.

I have an older sister, Nikki, who's also my best friend. She just got married in January (yay). My mom and her husband, Bill, live in Maryland, and my dad entered heaven in 2021. I've been with my boyfriend, Dan, for four years, and we live just five minutes from the PA office!





Announcing the first annual OCS NFL Survivor Pool!

Each week, you select one team. If your team wins, you move on to the next week. You can only play each team once. The top three contenders at the end of the regular season will win cash prizes! Here's a [brief explainer video](#) on how it works.

Please refer to an email from John Williams from Tuesday, August 26 for more details.

Entry fee is \$5 for the season. OCS is generously matching the entire pot so the more players, the bigger the prize!

The pool will be hosted on ESPN. To join, [click this link](#), and enter password: **PHIvsMIN2025**

Once you've joined, Venmo \$5 to John Williams (JaW1224, last 4 digits is 4631). Please put a 🍌 emoji in the description.

Deadline to join is **Wednesday, September 3, at 11:59pm CST.**

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

*Email [Marketing@
OakmontFinance.com](mailto:Marketing@OakmontFinance.com)*

