

THE **OCHappenings**



Table of Contents

Internal Updates.....	2
Monthly Report: August 2025.....	4
October Birthdays.....	5
October Anniversaries.....	5
Out & About.....	6
OCS Cares.....	6
Perfect Match Trivia: Eagles vs. Vikings.....	7
Congratulations, Jess!.....	8
Send Us Your Submissions.....	8

Internal Updates

Welcome



Bryan Kay
Director of Business Development (MN)



Adam Horsch
Senior Large Ticket Credit Analyst (MN)



Chloe Johns
Marketing Events Coordinator (PA)



Kayla Thielen
Account Manager (MN)

Marketing Updates:

Website launch!

On September 17th, 2025, the OCS Marketing Team's efforts came to fruition with the launch of OCS' new website. [Check it out now](#) and let us know what you think!

Fall Means It's Time for a Section 179 Push

From flyers to videos—and even an “everything you ever wanted to know” article—you'll be fully equipped with Section 179 insights for 2025! Need something extra (like an email communication)? Just reach out: marketing@oakmontfinance.com.

Field trip to Modern Group

On September 3rd, 2025, the OCS Marketing Team, alongside D.J. Jackson, Director of Business Development, paid a visit to one of our equipment dealers, Modern Group. They received a tour of their expansive Bristol, Pennsylvania location, viewed numerous pieces of equipment, and spoke with Paul VanNocker about Bandit equipment and the importance of Section 179.



HR Update:

Please feel free to reach out to [Paris Ellingson](#), HR Coordinator, if you are interested in talking to Tucker Rhodes of Cannaday Bloom regarding 401k information or if you have any questions.

IT Updates

Reminder to **update Chrome** to the newest version.

If you haven't already, please schedule time with **Joe Smith** for the **anti-virus update** to SentinelOne.

We will be doing a **fraud training** in Q4. Stay tuned.

Bad Data in is Bad Data out. Please be mindful of what is being entered in the Leasepath system. Double check and don't just enter something to get the deal through. Be thoughtful of what the information may lead to in the future or what someone else might want that data for.

If you see something, say something. If something isn't working or something just doesn't seem right, say it. [Open an IT Support ticket](#) so we can look at it and review it right away. Provide Contract Numbers and specific steps taken that led to the issue. Give as much information as possible so IT can try and recreate and doesn't have to come back to the User for additional information. It will just save everyone more time.

Employee News:

Congratulations to **D.J. Jackson** on receiving recognition by the Monitor for Top People in Equipment Finance in the Client Champion category.

401K Inquiry

Update Chrome Now

Schedule for Anti-Virus Update

IT Support Ticket



Congratulations

to D.J. on being recognized in the **Client Champion** category for the **Most Influential People in Equipment Finance list**



We are so proud of you
-The OCS Family



D.J. Jackson, CLFP
Director of Business Development

We Make It Possible



Monthly Report: August 2025

CREDIT APPS	The credit team reviewed 1,066 apps Daily average of 48 apps
SETS SENT OUT	The docs team sent out 491 sets YOY Increase: 19.46%
TITLES PROCESSED	Sent 215 titles for processing Received 250 completed Titles/ELTs
DOCS CHECKED IN	Funding checked in 588 sets of docs for an average of 27 sets a day
DEALS	579 deals funded for \$49.6MM
WORKING CAPITAL	Working Capital: \$288,900K funded for \$17,230 in fee income
FISCAL YTD	3062 deals for \$267.4MM Avg ticket size is \$87k (Excludes Working Capital deals)

October Birthdays

Paige Benson – October 4
 Jackie Hernandez – October 5
 Bryan Kay – October 9
 Brittany Elliot – October 11
 Joseph Leonard – October 15
 Rachel Dement – October 17
 John Williams – October 17

October Anniversaries

William Chandlee – 8 years
 Jennifer Foulds – 15 years
 Kayla Harren – 4 years
 Megan Zoba – 15 years

Happy Birthday & Congratulations!



Out & About

FABTECH

September 8-11, Chicago, IL
In attendance were Mindy, Michael, and Tatum

FedEx Service Provider Summit

September 8-11, Orlando, FL
In attendance were Chad and Jayme

AED Women In Equipment Conference

September 17-19, Chicago, IL
In attendance were Elise and Molly

MAC Tools Show

September 19 -20, Indianapolis, IN
In attendance were D.J. and Kristy

UP NEXT:

TCIA Expo

November 6-8, St. Louis, MO
Attending are Andrew, D.J., Katelyn, Kristy, and Tatum

OCS Cares

BVSPCA Gala (PA):

On Saturday September 6th, OCS employees attended the Forget-Me-Not Gala hosted by the Brandywine Valley SPCA. At the "Moulin Rouge" themed event they learned more about the group's initiatives and how they can help the homeless animals in the local area.

Pioneer Days (MN):

Albany Pioneer Days took place from September 11th to the 14th and OCS had plenty of volunteers in attendance. There they were able to celebrate the Albany, Minnesota culture and help the event run smoothly.

Miracle League (MN):

Last month members of the OCS Minnesota branch volunteered with the Miracle League which ensures that youth individuals with disabilities can play organized baseball.



Perfect Match Trivia: Eagles vs. Vikings

Congratulations to **Jessica Thompson** for winning last month's trivia on the Phillies vs the Twins series. Let's continue on the sports theme. The Eagles face-off against the Vikings on October 19 at U.S. Bank Stadium in Minnesota. 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.

What year did the Eagles join the NFL?

1928 1931 1933 1936

How many Super Bowl appearances do the Eagles have?

0 1 2 3 4 5

How many Super Bowl championships do the Eagles have?

0 1 2 3 4 5

What year did the Vikings join the NFL?

1957 1960 1961 1963

How many Super Bowl appearances do the Vikings have?

0 1 2 3 4 5

How many Super Bowl championships do the Vikings have?

0 1 2 3 4 5

Which quarterback(s) played for both Eagles and Vikings (check all that apply)?

Sam Bradford Bubby Brister Randall Cunningham
Jim McMahon Donovan McNabb Carson Wentz

Which team will win the game?

Eagles Vikings

Which team will have more sacks?

Eagles Vikings

Which team will have more penalty yards?

Eagles Vikings

Did you know...

The **EAGLES** and Steelers merged as the Phil-Pitt Combine (better known as the Steagles) for the 1943 season due to roster shortages during World War II.

The **VIKINGS** beat the Cleveland Browns 27-7 to win the last ever NFL Championship game in 1969 before the NFL-AFL merger, making them the first modern NFL expansion team to win the NFL championship game.

Congratulations, Jess!

Jessica Thompson, Funding Coordinator (PA) and Dan Mattern got engaged on Saturday September 20.



Send Us Your Submissions

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

Send it to
marketing@OakmontFinance.com
by October 14

