

THE **OCHappenings**



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\$1 Billion in AUM: A Milestone Worth Celebrating!



Yes, you read that right—\$1 Billion (with a “B”) in Assets Under Management as of October 29, 2025! OCS is thrilled to announce this incredible achievement, and we couldn't have done it without each and every one of you.

Let's take a moment to reflect on how our journey—from an independent broker to a powerful direct lender—has unfolded over the past 27 years.



In 2018, OCS began its transformation from broker to direct lender. Year after year, our team worked together to drive growth. Even through challenges—COVID, anyone?—and setbacks like limited funding in 2023, we stayed the course and reached this major milestone.

Let's reflect on OCS' growth trajectory (in numbers) over the past seven years:

	2018	2019	2020	2021	2022	2023	FY2025 (4/1/24-3/31/25)
Employees	26	27	32	45	60	64	80
# of Deals	1037	1407	1429	2910	5664	3737	5699
Originations	\$60,800,124	\$73,846,111	\$78,411,906	\$182,821,691	\$419,235,565	\$263,806,690	\$477,060,363
AUM			\$26,628,051	\$165,445,958	\$564,140,007	\$632,010,941	\$787,314,050

It's been a relentless journey to achieve this milestone, but it's been done alongside a strong, smart, and dedicated team, which always makes a task of this undertaking more manageable. Our leadership team wants to thank everyone for helping OCS get here—and we're excited to see where we'll go next! -Daryn Lecy

When I began the business in 1998, I enjoyed the broker model, and it served us well for many years. After weathering the 2009 recession and envisioning where we could go, I began putting the pieces in place about ten years ago, alongside our leadership team, to guide OCS in a new direction. -Joe Leonard.

HERE'S TO THE NEXT BILLION!

Internal Updates



Carla Bohnenstingl
Account Manager (MN)



Lana Wensman
Account Manager (MN)

Welcome to the **Team**

Marketing Updates:

Access/share OCS' [Section 179 Resource Page](#)

[Click here](#) to access the updated PDF applications. Feel free to download them and send to customers as needed.

[Section 179 Resource Page](#)

[PDF Applications](#)

Congratulations:

Mindy Lund, CLFP, is now Director of Business Development.

Employee News:

Joe Leonard graced the pages of a recent JA Mitsui Integrated Report, representing Oakmont Capital Services successful partnership!



Business Partner Feedback



Joe Leonard
Oakmont Capital Holdings, LLC
President & CEO

The employees of JAML have been very friendly and shown a strong willingness to understand and accept our culture and history. During our visit to the Tokyo head office, we were impressed by their eagerness to learn about us. With the support of the JAML Group, we look forward to further advancing our respective goals in the North American market through innovation and long-standing customer relationships.

Monthly Report: September 2025

CREDIT APPS	The credit team reviewed 1,110 apps Daily average of 53 apps
SETS SENT OUT	The docs team sent out 533 sets YOY Increase: 17%
TITLES PROCESSED	Sent 246 titles for processing Received 375 completed Titles/ELTs
DOCS CHECKED IN	Funding checked in 655 sets of docs for an average of 32 sets a day
DEALS	665 deals funded for \$57,800,397.60
WORKING CAPITAL	Working Capital: \$392K funded for \$24.8K in fee income
FISCAL YTD	3718 deals for \$324.5MM Avg ticket size is \$87k (Excludes Working Capital deals)



November Birthdays

- Bill Schmidt – November 18
- Deborah Reber – November 18
- Sean Eidle – November 25
- Aaron Dym – November 26
- Cole Hickman – November 26
- Debra Moritz – November 26
- Brenda Sand – November 29

November Anniversaries

- Austin Borgerding – 3 years
- Aaron Dym – 5 years
- Jacki Thielen – 4 years
- Nick Trapani – 1 year

Happy Birthday & Congratulations!



Out & About

Fall trade shows are winding down for the season! Here's our final show of the year:

TCI Expo – November 6–8, St. Louis, MO
 Attending: D.J., Tatum, Kristy, Katelyn, Andrew, Keara, and Rolando

Some photo highlights from recent tradeshow:



OCS Cares:

BVSPCA Volunteering (PA): This month two groups from our Pennsylvania office volunteered at the Brandywine Valley SPCA, West Chester campus. There they helped with sorting and organizing scrubs as well as socializing adorable puppies!



DAP Gift Card Drive & Donation (PA): October is National Domestic Violence Awareness Month (DVAM), so our PA team collected \$400 in grocery gift cards for survivors and OCS donated \$1800 to our local partner, the Domestic Abuse Project (DAP) of Delaware County.



Albany Homecoming (MN): This month, members of our Minnesota office took part in the local Homecoming festivities by hosting their very own spirit week. They celebrated by dressing up for Country Day, Decade Day, Jersey Day, and Spirit Day, where they flaunted the local high schools' color!



Halloween Poll and Fun Facts

Candy Corn: Yum or Yuck?
[Cast your vote!](#)



Halloween Fun Facts!

Jack O' Lanterns were originally made from turnips.

There has been a statue of Jason Voorhees, the serial killer from the "Friday the 13th" movie series, in the bottom of a Minnesota lake since 2013.

It only took 21 days for the horror movie "Halloween" to be filmed.

The very first Halloween parade in the U.S. took place in Anoka, Minnesota in 1920.

600 million pounds of Halloween candy is sold in the U.S. each year.

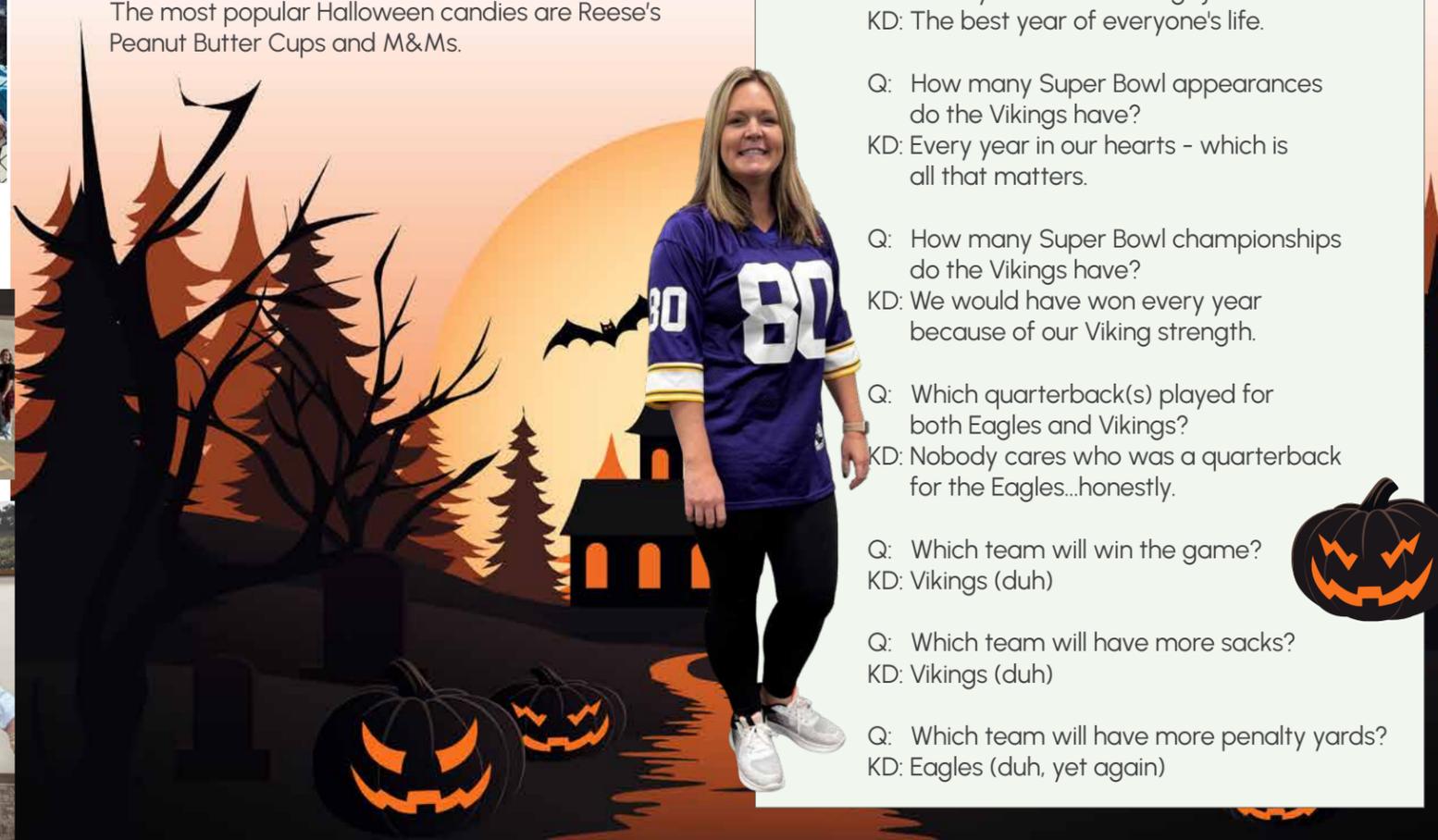
Illinois is the "Pumpkin Capital of the World". They produce about 90% to 95% of America's pumpkins.

The fear of Halloween is known as "Samhainophobia".

In mythology, black cats on Halloween were thought to be witches in disguise.

A full moon will occur on Halloween every 19 years.

The most popular Halloween candies are Reese's Peanut Butter Cups and M&Ms.



Trivia Winner (And Loser)

Congratulations to **Jessica Thompson** for winning last month's contest on the Eagles/Vikings game. That's two months in a row she has won the contest.

And the lowest score goes to...**Kristy Doll**.

Based on her answers can you tell if Kristy is an Eagles or Vikings fan?

Q: What year did the Eagles join the NFL?
 KD: Likely the dark ages because no one remembers or cares.

Q: How many Super Bowl appearances do the Eagles have?
 KD: I think they cheated every year if and when they appeared.

Q: How many Super Bowl championships do the Eagles have?
 KD: Again...cheaters don't actually win.

Q: What year did the Vikings join the NFL?
 KD: The best year of everyone's life.

Q: How many Super Bowl appearances do the Vikings have?
 KD: Every year in our hearts - which is all that matters.

Q: How many Super Bowl championships do the Vikings have?
 KD: We would have won every year because of our Viking strength.

Q: Which quarterback(s) played for both Eagles and Vikings?
 KD: Nobody cares who was a quarterback for the Eagles...honestly.

Q: Which team will win the game?
 KD: Vikings (duh)

Q: Which team will have more sacks?
 KD: Vikings (duh)

Q: Which team will have more penalty yards?
 KD: Eagles (duh, yet again)





Viking and Eagle fans gather.



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

Send Us Your Submissions

Send it to
[marketing@
OakmontFinance.com](mailto:marketing@OakmontFinance.com)
by November 14

