



Part 2B of Form ADV: *Brochure Supplement*

Terrence Bilkey

BilkeyKatz Investment Consultants
a division of Oakmont Capital Management, LLC

411 Seventh Avenue
Suite 1425
Pittsburgh, PA 15219

Telephone: (412) 803-9900

Email: tbilkey@bilkeykatz.com

October 1, 2025

This Brochure Supplement provides information about Terrence Bilkey that supplements the Oakmont Capital Management, LLC Brochure. You should have received a copy of that Brochure. Please contact Gina Kovatch, Chief Compliance Officer, if you did not receive our Brochure or if you have any questions about the contents of this Supplement.

Additional information about Terry Bilkey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Terrence Bilkey

Year of Birth: 1945

Education:

1980	MBA–Finance, Youngstown State University
1968-1969	Graduate School, University of Pittsburgh (Mathematics)
1963-1967	Undergraduate Degree, Westminster College (B.S., Math)

Professional Designations:

Mr. Bilkey earned the Chartered Financial Analyst (CFA) designation in 1985. The CFA designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA charter holder, candidates must pass each of three six-hour exams, possess a bachelor's degree (or equivalent, as assessed by the CFA Institute) and have 48 months of qualified, professional work experience. CFA charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information about the CFA designation is available at www.cfainstitute.org.

Business Background:

10/2025 – Present	Oakmont Capital Management, LLC, Senior Advisor
2002-9/2025	BilkeyKatz Investment Consultants, Inc., Co-Founder and Senior Consultant
2001-2002	Advanced Investment Management, Director of Client Service
1979-1999	Yanni•Bilkey Investment Consulting, Principal and Senior Consultant

Item 3. Disciplinary Information

Mr. Bilkey does not have any history of disciplinary events.

Item 4. Other Business Activities

Mr. Bilkey has no other business activities to report at this time.

Item 5. Additional Compensation

Mr. Bilkey does not receive any additional compensation from third parties for providing investment advice to clients.

Item 6. Supervision

In conjunction with the Chief Compliance Officer, Lawrence Jon Koteski, as the Managing Partner of Oakmont Capital Management, LLC is responsible for all employee supervision. Like all employees of Oakmont Capital Management, LLC, he is subject to the policies and procedures governing client advisory activities, operations, and general business strategy as overseen by the Chief Compliance Officer, Gina M. Kovatch.

Mr. Koteski's contact information is as follows:
Ph: (412) 828-5550
E-mail: koteski@oakmontcap.com

Mrs. Kovatch's contact information is as follows:
Ph: (412) 828-5550
E-mail: gkovatch@oakmontcap.com



Part 2B of Form ADV: *Brochure Supplement*

Darrin Keith Duda

BilkeyKatz Investment Consultants
a division of Oakmont Capital Management, LLC

411 Seventh Avenue
Suite 1425
Pittsburgh, PA 15219

Telephone: (412) 803-9900

Email: dduda@bilkeykatz.com

October 1, 2025

This Brochure Supplement provides information about Darrin Duda that supplements the Oakmont Capital Management, LLC Brochure. You should have received a copy of that Brochure. Please contact Gina Kovatch, Chief Compliance Officer, if you did not receive our Brochure or if you have any questions about the contents of this Supplement.

Additional information about Darrin Duda is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Darrin Duda

Year of Birth: 1969

Education:

1997-1999 MBA-Finance, Boston University
1987-1991 Undergraduate Degree, Harvard University (A.B., Economics, Cum Laude)

Professional Designations:

Mr. Duda earned the Chartered Financial Analyst (CFA) designation in 1996. The CFA designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA charter holder, candidates must pass each of three six-hour exams, possess a bachelor's degree (or equivalent, as assessed by the CFA Institute) and have 48 months of qualified, professional work experience. CFA charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information about the CFA designation is available at www.cfainstitute.org.

Mr. Duda earned the Chartered Alternative Investment Analyst (CAIA) designation in 2008. The CAIA program is sponsored by the Chartered Alternative Investment Analyst Association and provides individuals with the core competencies required to create, manage, and monitor an institutional-quality portfolio consisting of both traditional and alternative investments. The program is designed to facilitate self-learning through a comprehensive set of readings. Candidates' knowledge is then assessed through exams, available globally at computerized testing centers. The program is organized into two levels of study, and candidates are able to earn the designation within a single year. Candidates must successfully complete the level II exam within three years of successfully completing level I. More information about the CAIA designation is available at www.caia.org.

Mr. Duda earned the Accredited Investment Fiduciary® (AIF®) designation from the Center for Fiduciary Studies in 2014. The AIF designation certifies he has specialized knowledge of fiduciary standards of care and their application to the investment management process. To attain the AIF credential, one must successfully enroll and complete AIF training, pass the AIF examination, meet the experience/education requirements, and apply within one year of passing the examination. Designees are expected to abide by the AIF Designee Code of Ethics. More information about the AIF designation is available at www.fi360.com.

Business Background:

10/2025 – Present	Oakmont Capital Management, LLC, Partner and Chief Investment Officer
2007-9/2025	BilkeyKatz Investment Consultants, Inc., Principal and Senior Consultant
2003-2007	Duquesne Light Company, Manager, Investor Relations & Trust Investments
2002-2003	Independent Contractor-Gateway Health Plan, L.P., Consultant
1999-2002	Yanni Partners, Senior Consultant
1992-1999	Acadian Asset Management, Vice President, Portfolio Construction & Optimization

Item 3. Disciplinary Information

Mr. Duda does not have any history of disciplinary events.

Item 4. Other Business Activities

Mr. Duda has no other business activities to report at this time.

Item 5. Additional Compensation

Mr. Duda does not receive any additional compensation from third parties for providing investment advice to clients.

Item 6. Supervision

In conjunction with the Chief Compliance Officer, Lawrence Jon Koteski, as the Managing Partner of Oakmont Capital Management, LLC is responsible for all employee supervision. Like all employees of Oakmont Capital Management, LLC, he is subject to the policies and procedures governing client advisory activities, operations, and general business strategy as overseen by the Chief Compliance Officer, Gina M. Kovatch.

Mr. Koteski's contact information is as follows:

Ph: (412) 828-5550

E-mail: koteski@oakmontcap.com

Mrs. Kovatch's contact information is as follows:

Ph: (412) 828-5550

E-mail: gkovatch@oakmontcap.com



Part 2B of Form ADV: *Brochure Supplement*

Patrick William Fisher

BilkeyKatz Investment Consultants
a division of Oakmont Capital Management, LLC

411 Seventh Avenue
Suite 1425
Pittsburgh, PA 15219

Telephone: (412) 803-9900

Email: pfisher@bilkeykatz.com

October 1, 2025

This Brochure Supplement provides information about Patrick Fisher that supplements the Oakmont Capital Management, LLC Brochure. You should have received a copy of that Brochure. Please contact Gina Kovatch, Chief Compliance Officer, if you did not receive our Brochure or if you have any questions about the contents of this Supplement.

Additional information about Patrick Fisher is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Patrick W. Fisher

Year of Birth: 1967

Education:

1997-2000	MBA-Finance, Duquesne University
1986-1991	Undergraduate Degrees, West Virginia University (B.S., Business Administration, Accounting/B.A., English)

Professional Designations:

Mr. Fisher earned the Chartered Financial Analyst (CFA) designation in 2003. The CFA designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA charter holder, candidates must pass each of three six-hour exams, possess a bachelor's degree (or equivalent, as assessed by the CFA Institute) and have 48 months of qualified, professional work experience. CFA charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information about the CFA designation is available at www.cfainstitute.org.

Mr. Fisher earned the Chartered Alternative Investment Analyst (CAIA) designation in 2015. The CAIA program is sponsored by the Chartered Alternative Investment Analyst Association and provides individuals with the core competencies required to create, manage, and monitor an institutional-quality portfolio consisting of both traditional and alternative investments. The program is designed to facilitate self-learning through a comprehensive set of readings. Candidates' knowledge is then assessed through exams, available globally at computerized testing centers. The program is organized into two levels of study, and candidates are able to earn the designation within a single year. Candidates must successfully complete the level II exam within three years of successfully completing level I. More information about the CAIA designation is available at www.caia.org.

Business Background:

10/2025 – Present	Oakmont Capital Management, LLC, Partner and Head of Consulting Services
2012-9/2025	BilkeyKatz Investment Consultants, Inc., Principal and Senior Consultant
2008-2012	Schneider Downs Wealth Management Advisors, LP, Investment Relationship Manager
2000-2008	Yanni Partners, Senior Consultant
1998-2000	Horix Manufacturing, Assistant Accounting Manager
1992-1998	Mellon Bank Corporation, Cash Manager

Item 3. Disciplinary Information

Mr. Fisher does not have any history of disciplinary events.

Item 4. Other Business Activities

In May 2018, Mr. Fisher became a member of the Investment Committee for the YWCA Greater Pittsburgh. In January 2025, Mr. Fisher became a Board member of the CCAC Educational Foundation. These activities constitute less than 5% of his time on an annual basis.

Item 5. Additional Compensation

Mr. Fisher does not receive any additional compensation from third parties for providing investment advice to clients.

Item 6. Supervision

In conjunction with the Chief Compliance Officer, Lawrence Jon Koteski, as the Managing Partner of Oakmont Capital Management, LLC is responsible for all employee supervision. Like all employees of Oakmont Capital Management, LLC, he is subject to the policies and procedures governing client advisory activities, operations, and general business strategy as overseen by the Chief Compliance Officer, Gina M. Kovatch.

Mr. Koteski's contact information is as follows:

Ph: (412) 828-5550

E-mail: koteski@oakmontcap.com

Mrs. Kovatch's contact information is as follows:

Ph: (412) 828-5550

E-mail: gkovatch@oakmontcap.com



Part 2B of Form ADV: *Brochure Supplement*

Jerry Edward Katz

BilkeyKatz Investment Consultants

a division of Oakmont Capital Management, LLC

411 Seventh Avenue
Suite 1425
Pittsburgh, PA 15219

Telephone: (412) 803-9900

Email: j Katz@bilkeykatz.com

October 1, 2025

This Brochure Supplement provides information about Jerry Katz that supplements the Oakmont Capital Management, LLC Brochure. You should have received a copy of that Brochure. Please contact Elda Bertan, Chief Compliance Officer, if you did not receive our Brochure or if you have any questions about the contents of this Supplement.

Additional information about Jerry Katz is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Jerry Katz

Year of Birth: 1958

Education:

1981-1984	MBA-New York University Stern School of Business
1978-1980	Undergraduate Degree, University of Southern California
1976-1978	Temple University

Professional Designations:

Mr. Katz earned the Chartered Financial Analyst (CFA) designation in 1988. The CFA designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA charter holder, candidates must pass each of three six-hour exams, possess a bachelor's degree (or equivalent, as assessed by the CFA Institute) and have 48 months of qualified, professional work experience. CFA charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information about the CFA designation is available at www.cfainstitute.org.

Business Background:

10/2025 – Present	Oakmont Capital Management, LLC, Senior Advisor
2002-9/2025	BilkeyKatz Investment Consultants, Inc., Co-Founder and Senior Consultant
1999-2002	DQE Inc., General Manager, Trust Investments & Risk Manager
1984-1999	Yanni-Bilkey Investment Consulting, Senior Consultant

Item 3. Disciplinary Information

Mr. Katz does not have any history of disciplinary events.

Item 4. Other Business Activities

Mr. Katz serves as a member of the Finance and Investment Committee for The Advanced Leadership Institute, as a member of the Investment Committee for the Hebrew Loan Association of Pittsburgh, and as Treasurer of Bakery Village HOA. These activities constitute less than 5% of his time on an annual basis.

Item 5. Additional Compensation

Mr. Katz does not receive any additional compensation from third parties for providing investment advice to clients.

Item 6. Supervision

In conjunction with the Chief Compliance Officer, Lawrence Jon Koteski, as the Managing Partner of Oakmont Capital Management, LLC is responsible for all employee supervision. Like all employees of Oakmont Capital Management, LLC, he is subject to the policies and procedures governing client advisory activities, operations, and general business strategy as overseen by the Chief Compliance Officer, Gina M. Kovatch.

Mr. Koteski's contact information is as follows:
Ph: (412) 828-5550
E-mail: koteski@oakmontcap.com

Mrs. Kovatch's contact information is as follows:
Ph: (412) 828-5550
E-mail: gkovatch@oakmontcap.com