

# The Corporate Bitcoin Playbook

**Occams Advisory chose to hold bitcoin in corporate treasury and to safeguard it with Onramp's Multi-Institution Custody (MIC). Their path shows how a business can move from curiosity to a live policy.**



## Introduction

In an age of fragile balance sheets and rising counterparty risk, **Occams Advisory** decided to act where others only theorized.

Occams Advisory moved part of their corporate treasury into bitcoin—and chose to safeguard it through Onramp's Multi-Institution Custody (MIC) model.

### EXECUTABLE CONVICTION

Their story is not just about holding bitcoin. It's about governance, risk management, and how a well-run business makes conviction executable.

### CURIOSITY TO COMPREHENSION TO CORPORATE POLICY

Occams' public milestones—an initial BTC acquisition followed by an additional bitcoin purchase—mark visible steps in a deeper journey: from curiosity, to comprehension, to corporate policy.

The Occams logo, featuring the word "occams" in a lowercase, sans-serif font. The "o" is blue, and the "c" is orange, with the remaining letters in blue. The logo is set against a white, rounded rectangular background.

### ABOUT OCCAMS

Occams is a multi-line professional services firm serving MSMEs across finance, tax, and technology.



# The Adoption Pattern That Worked

## 001

### Equip & Empower a 'Bitcoin Champion'

Occams had a single internal sponsor responsible for moving the idea through the organization. Onramp provided short primers, FAQs, and a board-ready deck the champion could adapt by role.

The champion circulated educational resources to align the "why," then returned with the next wave of questions for tighter answers. This loop repeated until stakeholders shared the same terms and the same mental model.

## 002

### Solve Custody First

Most friction lives in custody, not the buy decision. The champion used three pieces of collateral on repeat:

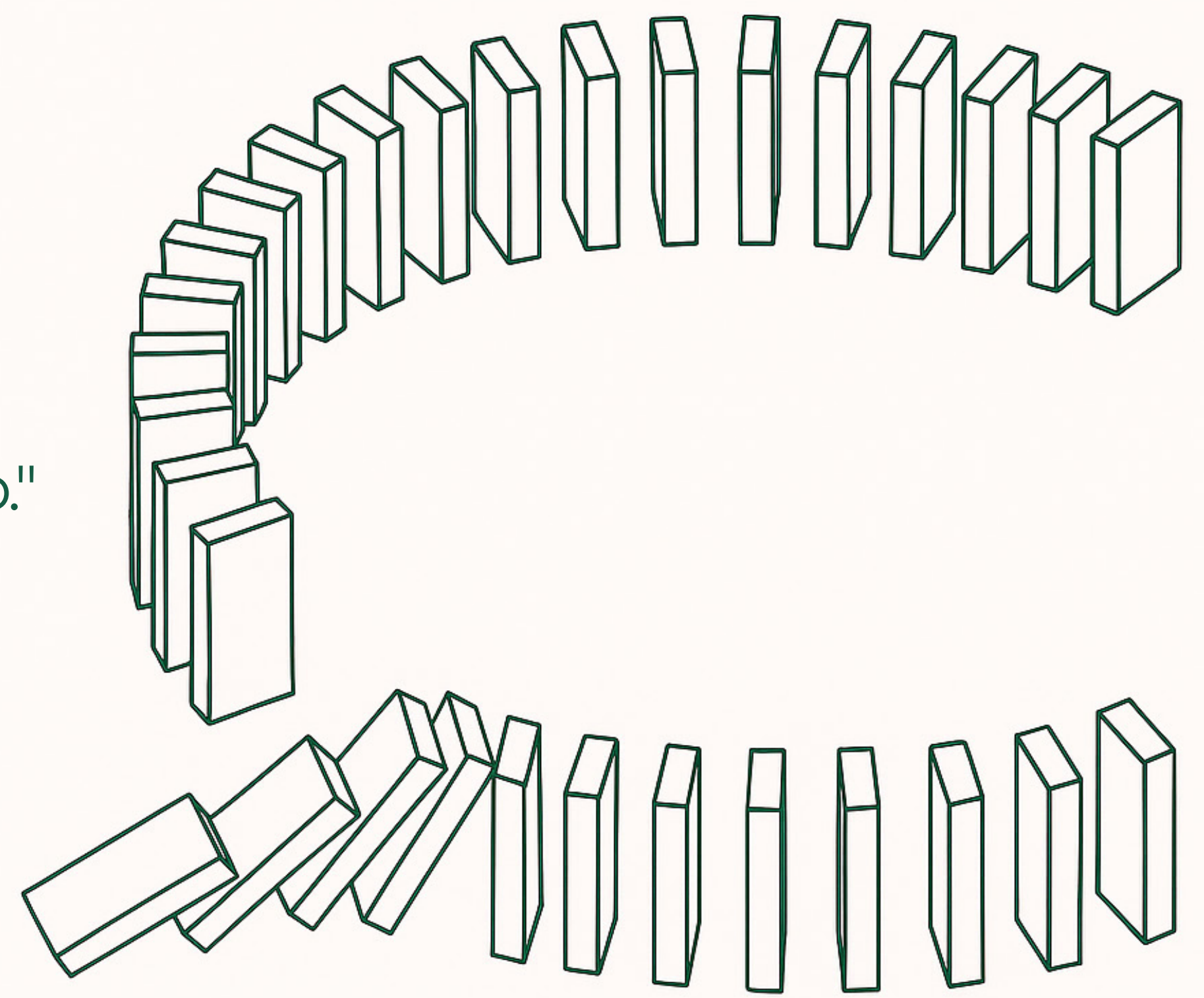
1. A matrix comparing self-custody, single custodian, and MIC across operational, legal, and counterparty risk.
2. A visual explainer of MIC's 2-of-3 quorum across independent institutions, the "triangle badge," that made control paths legible to non-engineers.
3. Deep dive explainers that covered key ceremonies, signer rotation, incident response, test transactions, and reconciliation.

## 003

### Build a Simple Policy

The early policy decisions were intentionally narrow:

- **Scope:** bitcoin only, clearly separated from broader "crypto."
- **Sizing:** small and rules-based, tied to free cash flow, with periodic review windows to scale. Occams' public updates reflect a staged approach from 10 BTC to 13.059 BTC.
- **Controls:** named roles mapped to a 2-of-3 quorum, thresholds for routine and exceptional transactions, key-ceremony documentation, and a signer transition plan.





# Why Corporates Need Multi-Institution Custody:

## SEGREGATION AND TITLE

Each client receives a dedicated on-chain vault that is legally titled to the business. No omnibus pools.

## DISTRIBUTED CONTROL

A 2-of-3 quorum across three independent institutions eliminates unilateral action by any single party.

## ON-CHAIN VERIFIABILITY

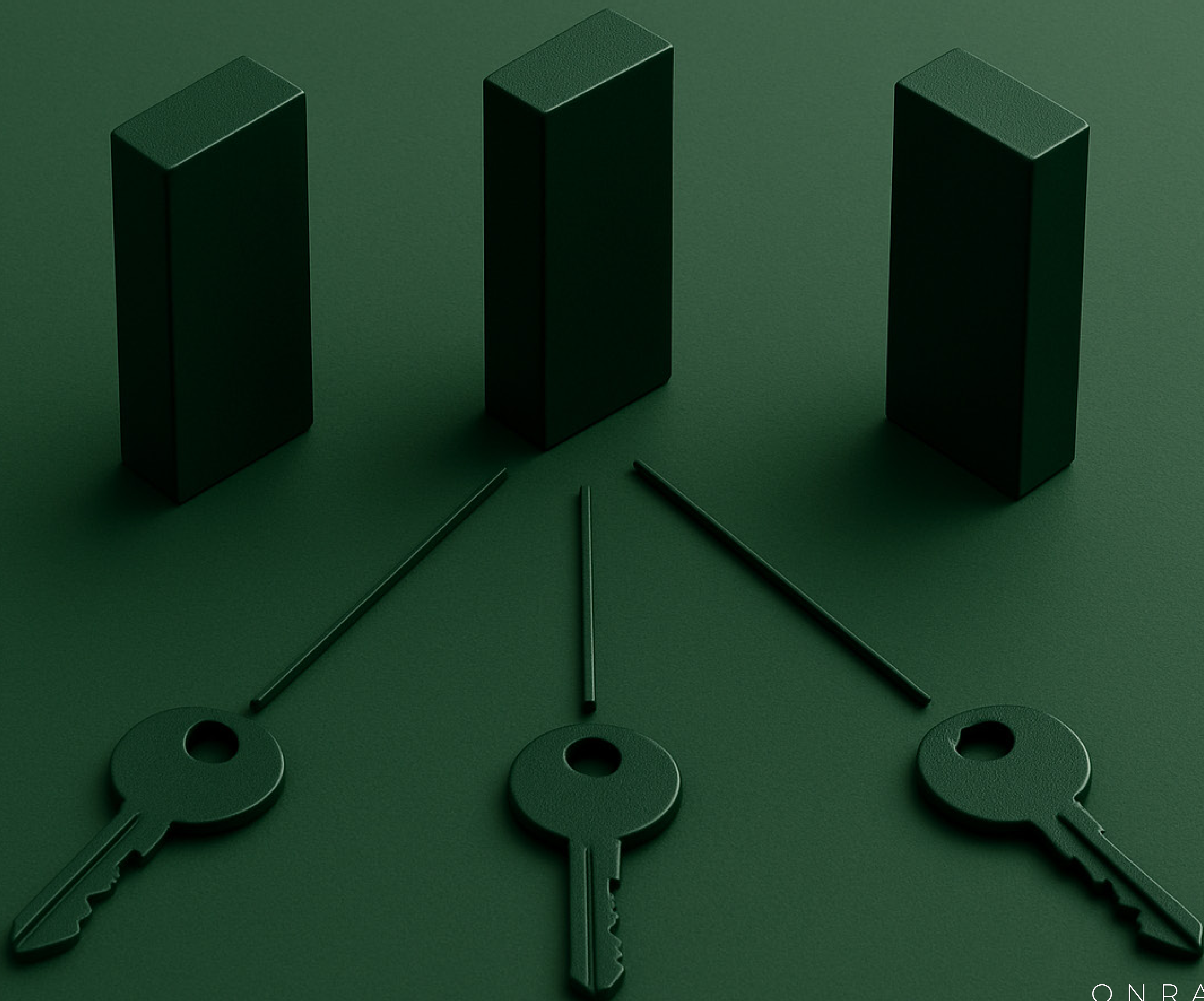
Addresses are attestable. Treasury teams can reconcile holdings to internal ledgers.

## OPERATIONAL CONTINUITY

Loss of any one signer or a temporary outage does not strand funds.

## FIDUCIARY FIT

MIC aligns with fiduciary expectations because it removes single points of failure.



# What Changed Inside Occams Advisory

## Shared understanding replaced debate:

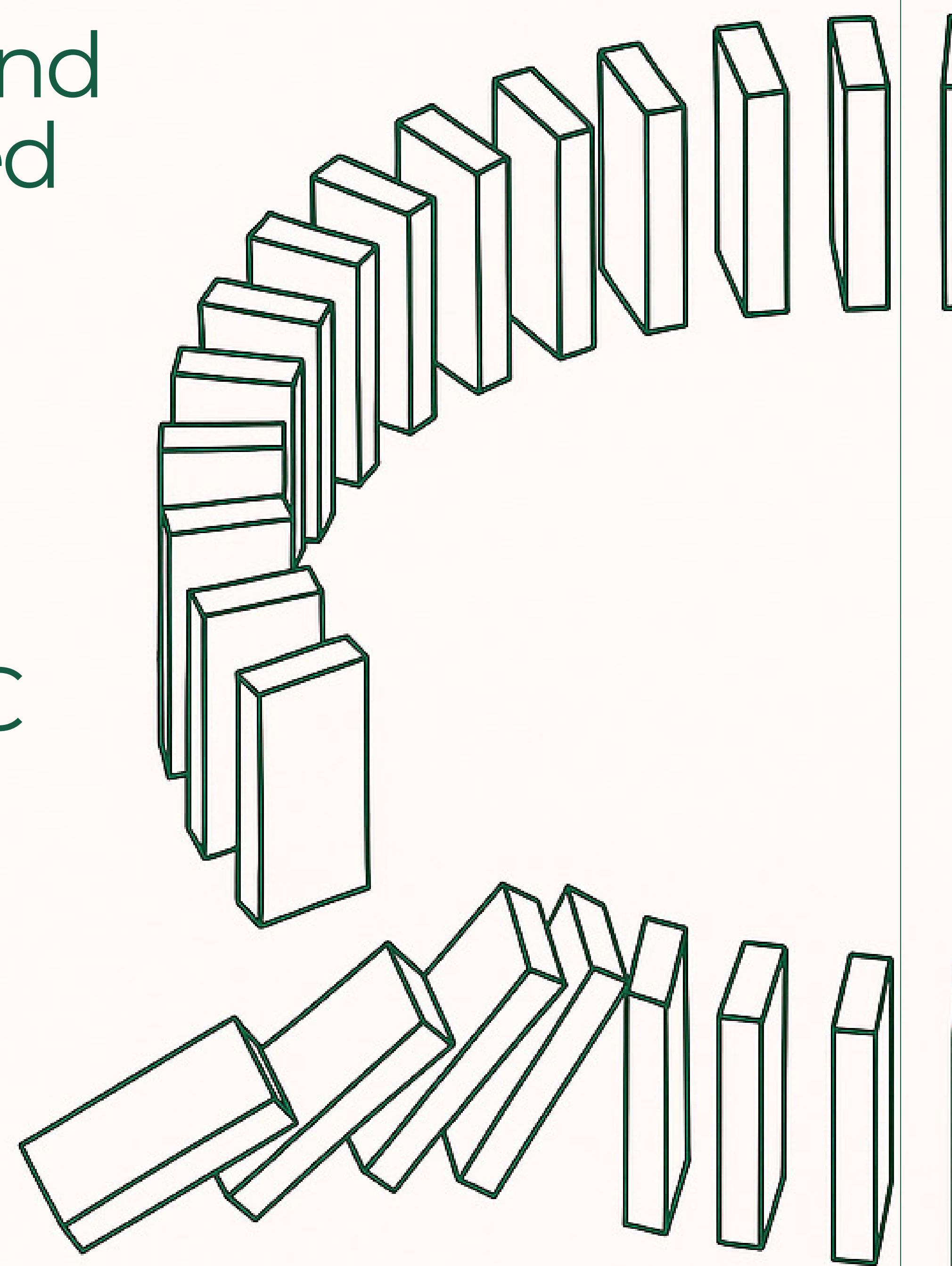
Role-specific education and clear custody diagrams gave executives a common model for risk.

## From idea to policy:

A cash-flow-based sizing rule and documented controls translated conviction into a durable operating cadence.

## Public milestones backed by process:

Occams announced the 10 BTC acquisition, signaled intent to expand, and later updated the reserve to 13.059 BTC.





# The Playbook Others Can Reuse

**Start with one champion and give them working tools:** Short primers, a custody comparison matrix, the MIC "triangle" diagram, and a one-page runbook.

**Keep scope and sizing simple:** Bitcoin only. Begin with a small, rules-based allocation tied to free cash flow.

**Map control to your org chart:** Name roles to a 2-of-3 quorum. Define thresholds for approvals.

**Rehearse before size:** Test withdrawals and reconciliations build confidence across finance, security, and audit.

**Document once, use everywhere:** The same artifacts that win board approval will shorten auditor cycles and vendor reviews.

# What Onramp Provided

- **Role-specific education** that the internal champion could adapt for CEO, board, CTO, and ops.
- **Custody collateral that removed ambiguity:** comparison matrix, MIC diagram, and runbook checklists.
- **Iterative guidance** as new questions surfaced, so each pass inside the company landed cleaner than the last.
- **A custody architecture** that matches corporate governance.



CONCLUSION

# The First Domino

**Occams didn't wait for consensus. They acted.**

**Their decision didn't just add bitcoin to a balance sheet — it signaled the rapidly changing governance model for digital assets in business.**

**And when future treasurers look back at the first wave of corporate bitcoin adoption, they'll see a line of dominoes.**

**And that Occams Advisory was one of the first to tip forward—in the right direction.**