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## **FOR IMMEDIATE RELEASE**

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## **Vizo Financial's October 2025 Education Calendar**

**Greensboro, N.C.** (September 25, 2025) – At Vizo Financial we are committed to providing quality education to credit unions and their staff.

Here is a full list of our upcoming educational opportunities for October 2025.

### **ACH Exception Handling Webinar**

*Allen Young, AAP, VP, education, PaymentsFirst*  
October 7, 2025 at 2:00 p.m. ET

Do you understand what an ACH Exception is and the requirements around them? ACH exceptions at times can be very time consuming, frustrating and confusing. Some days you may experience the exception trifecta of all three! Join us for this session to help you analyze those issues and build your confidence as an exception guru.

This 90-minute webinar is designed for payments professionals, ACH and operations staff, compliance staff, or anyone who wishes to learn more about ACH Exception Handling.

[Learn More](#)

### **The Change Within: A Practical Path to Personal Growth Webinar**

*Jeanne Heath, director of cultural engagement & learning, Vizo Financial*  
October 8, 2025 at 10:00 a.m. ET

Change is inevitable, but managing it effectively is a skill. Whether you're facing career shifts, lifestyle changes or development challenges, this session will empower you with the tools to take control of your personal growth journey. In this thought-provoking webinar, we'll share practical techniques to help you confidently navigate change, overcome challenges that stand in your way and build lasting habits that support your personal and professional evolution.

This session is perfect for anyone looking to make change stick - because in a world where change is constant, your ability to adapt is your greatest asset.

[Learn More](#)

(More)

### **The Pyramid of Success by John Wooden Webinar**

*Joe Bertotto, SVP/chief culture officer, Vizo Financial*

October 21, 2025 at 2:00 p.m. ET

If you’ve watched the hit Apple TV series, Ted Lasso, you may have seen the poster of John Wooden’s Pyramid of Success hanging in Ted’s office. John Wooden is the legendary basketball coach who won 10 National Championships while coaching at UCLA and he is one of only five people inducted into the Basketball Hall of Fame as a player and a coach. Interestingly, Coach Wooden never spent his time talking to his player about winning; instead, he focused his players on working to become better people. Coach Wooden used his Pyramid of Success as the linchpin for these conversations with players. John Wooden spent 14 years identifying 25 behaviors he believed were necessary to achieve his idea of success. This search culminated in a simple but profound diagram Wooden called the Pyramid of Success, which he completed in 1948. Almost eight decades later these foundational behaviors have weathered the test of time. This webinar has nothing to do with basketball and everything to do with the characteristics that, when applied, lead to great success for you and your team.

This webinar is designed for credit union managers or anyone wishing to learn more about leadership and John Wooden’s Pyramid of Success.

[Learn More](#)

### **Mobile Deposit Capture: Risk Management and Compliance Webinar**

*Randall C. Traynham, director of education, PaymentsFirst*

October 23, 2025 at 10:00 a.m. ET

Mobile deposit capture (MDC) has become a ubiquitous feature of modern banking, offering convenience and efficiency to both financial institutions and their customers. However, with this growth comes a heightened need for robust risk management and compliance measures.

Join us for this informative webinar as we delve into the key risks associated with MDC, including fraud, operational challenges, and regulatory compliance. We will discuss best practices for:

This 90-minute webinar is designed for payments professionals, operations staff, compliance staff or anyone who wishes to learn more about mobile deposit capture risk and compliance.

[Learn More](#)

## **Navigating the Suspicious Activity Report (SAR) Process: A Comprehensive Guide Webinar**

*Cindy Hagan, VP, compliance and fraud risk, Vizo Financial*  
October 28, 2025 at 10:00 a.m. ET

Learn how to recognize red flags, understand key regulatory requirements, and complete SAR forms with confidence. Whether you're new to SAR filings or seeking to refine your process, this session will equip you with the essential tools to ensure compliance and mitigate risks effectively. Join us to gain valuable insights and hands-on knowledge in suspicious activity reporting!

This webinar is designed for all credit union staff who complete SARs or want to know how to complete a SAR.

### **[Learn More](#)**

## **From Data to Action: How Vertice AI Empowers Credit Unions on Corelation to Deliver Personalized Engagement at Scale Webinar**

*Sam Nevers, Vertice AI*  
October 30, 2025 at 2:00 p.m. ET

Your credit union has no shortage of data in your core platform—but transforming that data into timely, personalized member engagement has long been a challenge. Traditional member engagement tactics often rely on broad campaigns or require lengthy and resource intensive cycles to extract the data needed for personalization. But what if the data and analytics needed for personalization and growth were presented to your credit union easily, consistently and repeatedly—without ad-hoc requests for Corelation extracts?

In this webinar, discover how Vertice AI helps credit unions personalize engagement at scale by transferring data within 48 hours and going live in weeks.

Vertice AI bridges the gap between existing data and action, enabling credit unions to harness the power of advanced analytics and AI to drive personalized engagement—without adding complexity or resources. The Vertice AI solution empowers marketing, operations and other growth focused teams to turn core data into recommendations that improve member financial health, increase product adoption and boost retention.

You’ll hear from a peer credit union who has leveraged the Corelation data extraction, purpose built for Vertice AI, to transform their core data into insights that have helped them better know, grow and measure their membership in weeks. Additionally, you’ll hear how your relationship with Vizo Financial gains you access to exclusive pricing and terms for adopting the Vertice AI Solution.

This webinar is a must-attend for credit union executives, membership analysts, marketing teams and anyone keen on leveraging data and analytics for actionable insights and sustainable growth at your credit union.

**[Learn More](#)**

To view more, please visit the [education page](#) on our website.

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***About Vizo Financial Corporate Credit Union***

Vizo Financial Corporate Credit Union is a cooperative built by credit unions. We’re a state-chartered corporate credit union and a provider of back-office solutions in the areas of money management, payments, risk management, core processing and education. We’re a forward-thinking organization that places a strong emphasis on innovation, strategy and building connections. But, even more than that, we’re allies for the CUSOs, leagues, chapters and 1,000+ credit unions that we serve. Our mission is to help accelerate credit union success through proven INSIGHT, unmatched EXPERTISE and trusted PARTNERSHIPS. Discover more at [www.vfccu.org](http://www.vfccu.org).