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Vizo Financial's November 2025 Education Calendar

Greensboro, N.C. (October 30, 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 November 2025.

Payments Conference

November 5-6, 2025 - *Virtual*

Join us for Vizo Financial's 2025 virtual Payments Conference, an immersive online event on November 5-6 that will unite credit union professionals and payment industry leaders for an in-depth exploration of the evolving payments landscape.

This year's agenda is packed with essential sessions focused on the most critical payments issues and advancements facing today's payments world. Learn how to conduct comprehensive risk evaluations to ensure compliance and operational security. Explore the latest tools to combat emerging threats. Stay ahead of shifting regulatory requirements and industry standards. This virtual conference will offer your credit union actionable insights to ensure your institution is ready for the future of payments.

Beyond the sessions, this premier payments events will also include:

- Continuing education credits
- Virtual networking opportunities
- An all-in-one hub to streamline the online event experience
- Sessions available on-demand

[Learn More](#)

Connect with Andi

Andi Crockett, director of payments product managers, Vizo Financial/MY CU Services
November 13 at 1:00 p.m. ET

Have questions about ACH return codes, ISO 20022, FedNow and more? Connect with Andi during these one-hour sessions! This dedicated time is for anyone at your credit union to drop in and ask questions, discuss concerns, or get feedback on ACH, Domestic and International Wires,

(More)

Foreign Check Collection and Instant Payments. These meetings will be held via Zoom and registration is required at least 30 minutes prior to each meeting. These sessions do not qualify for CPE credits.

Andi Crockett is the director of payments product managers at Vizo Financial and their payment CUSO, MY CU Services. Her role involves developing and implementing EFT services — including ACH for Business, ACH Contingency, ACH Receipt & Returns, ACH Originations, ACH Settlement, Domestic and International Wires, Foreign Check Collection and Instant Payments.

These sessions are designed to give attendees the opportunity to ask Andi questions about ACH, Domestic and International Wires, Foreign Check Collection and Instant Payments. There will not be a formal presentation during the meetings. To participate in these sessions, you will need to have working computer audio capabilities, including a microphone and either speakers or headphones.

[Learn More](#)

Building a Robust ERM Program: Strategies for Effective Implementation

Belinda Mumma, enterprise risk management director, Vizo Financial

Michael Cohn, principal, Wolf & Company, P.C.

November 13 at 2:00 p.m. ET

In this educational webinar, we’ll guide you through the essential steps to implement a successful Enterprise Risk Management (ERM) program that safeguards your credit union from potential risks and drives strategic decision-making. Join us to develop a clear, actionable plan for integrating ERM into your business operations, ensuring better preparedness and resilience in a rapidly changing landscape. Additionally, we will discuss emerging threats that should be on the radar for all who wear the Risk Officer hat.

This session will discuss:

- *Creating a Strong ERM Framework:* Learn how to build a solid foundation for identifying and managing risks across your organization.
- *Defining Risk Appetite and Tolerance:* Discover how to establish clear thresholds for risk-taking that align with your company’s goals and values.
- *Assessing and Prioritizing Risks:* Understand methods for evaluating risks, including qualitative and quantitative approaches, to ensure a proactive risk management strategy.
- *Monitoring and Reporting:* Gain insights into effective tools for tracking risk metrics and creating detailed reports that keep key stakeholders informed.

This webinar is designed for all credit union team members who are responsible for enterprise risk management at their credit union or anyone wishing to learn more about ERM programs.

[Learn More](#)

Demystifying Regulation E: A Focus on Error Resolution

Allen Young, VP, education, PaymentsFirst

November 18 at 2:00 p.m. ET

Regulation E protects consumers in Electronic Fund Transfers (EFTs). The error resolution process is one of the most crucial aspects of Regulation E compliance.

During this webinar, we will discuss:

- *Defining an Error*: Learn about the definition of errors that occur in EFTs.
- *Consumer Rights and Responsibilities*: Understand consumer rights and the steps a financial institution needs to take when an error is reported.
- *Dispute Resolution Process*: Learn about the steps involved in resolving disputes, including timeframes and communication requirements.
- *Best Practices*: Gain valuable tips and strategies for preventing EFT errors and handling them effectively.

This 90-minute webinar is designed for payments professionals, operations staff, compliance staff or anyone who wishes to learn more about Regulation E error resolution.

[Learn More](#)

Tabletop Exercise – Threats to Your Credit Union

Mark Clarke, business continuity administrator, Vizo Financial

November 20 at 2:00 p.m. ET

A tabletop exercise is a walk-through of emergency procedures with your credit union’s key personnel about what could happen in a real-life incident. This live tabletop will test your credit union’s plans with a “mock” real-world example. How will your team handle the situation? Are you prepared?

This tabletop session is designed for multiple credit union team members to participate together. The session will break periodically for 5 to 10-minute intervals to allow time for team discussion regarding the tabletop scenario. The goal of this exercise is to test the effectiveness and efficiency of the team, as well as your credit union’s security and risk plans.

Tabletop Details

- This session will NOT be recorded for playback.
- This session does NOT qualify for CPE credits.
- No webinar materials or presentations will be made available for this session.
- This exercise is designed for multiple team members.
- Certificates of Completion will be awarded to individuals who log in to the live session independently.

[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.