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Vizo Financial's May 2026 Education Calendar

Greensboro, N.C. (April 30, 2026) – 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 May 2026.

Building Leadership Readiness, Not Just Replacements

Janice Appleby, SVP/chief human resources officer, Vizo Financial

May 5, 2026 at 2:00 p.m. ET

Effective succession planning goes beyond naming a backup. It's about building the capabilities your organization needs for the future. This webinar will break down how to identify critical roles, assess talent objectively and ensure leadership readiness. We'll discuss how to develop successors through experiential learning, coaching and accountability. You'll also learn how to integrate succession planning with talent strategy, performance management and workflow planning. Attendees will walk away with practical insights to protect business continuity, preserve institutional knowledge and communicate succession strategies thoughtfully and transparently.

This session is designed for credit union leaders who play a role in developing talent and succession planning.

[Learn More](#)

Double Booked: When Nacha and Reg E Don't Agree

Joy Babcock, director of education, PaymentsFirst

May 12, 2026 at 2:00 p.m. ET

When it comes to handling ACH disputes and unauthorized transactions, financial institutions often find themselves caught between two sets of rules: the Nacha operating rules and Regulation E. While both are designed to protect consumers and guide financial institutions, they do not always align. This session will break down the differences and overlaps between Nacha and Reg E, giving you the knowledge to navigate those situations and apply the right rule at the right time.

(More)

This session will cover:

- The purpose of Nacha rules vs. Regulation E
- Timelines for consumer claims and financial institution responses
- RDFI responsibilities under Nacha vs. Reg E
- When to apply which rule
- Real-world examples to clarify common areas of confusion

This 90-minute webinar is designed for ACH professionals, operations staff, risk staff, compliance staff or anyone who wishes to learn more about Reg E and Nacha operating rules.

[Learn More](#)

Quarterly Economic Insights

Scott Wood, SVP/chief investment officer, Vizo Financial
May 14, 2026 at 2:00 p.m. ET

We can all agree that the economy and the markets are unpredictable. So, what can we do? We can use the insights we have through trends, expert opinions, past performance in similar situations and so on to make educated predictions. That’s what these quarterly sessions are all about – sharing our insights to help your credit union achieve financial fortitude, regardless of what may actually happen in the future.

Each quarter Scott Wood, Vizo Financial’s SVP, chief investment officer, along with other Vizo Financial experts will examine the financial landscape and discuss topics at each session based on the current environment.

This session is designed for staff responsible for managing the credit union or anyone wishing to learn more about the state of the economy and its impact to the credit union industry.

[Learn More](#)

Fraudsters Toolbox: ACH Fraud

Joy Babcock, director of education, PaymentsFirst
May 27, 2026 at 2:00 p.m. ET

Step inside the mind of modern fraudsters targeting ACH transactions. This course exposes common tactics and offers actionable strategies to fortify your defenses and protect your systems.

This comprehensive webinar will equip you with the knowledge and strategies to:

- Identify common ACH fraud schemes and red flags
- Gain insights into emerging fraud techniques
- Learn practical methods to detect and mitigate risk

- Explore case studies illustrating successful interventions"

This 60-minute webinar is designed for ACH professionals, operations staff, risk staff, compliance staff or anyone who wishes to learn more about ACH fraud.

[Learn More](#)

Using AI Safely and Responsibly: What Every Financial Institution Needs to Know

Michael Carpenter, VP, risk management, Ncontracts

May 28, 2026 at 2:00 p.m. ET

AI is moving quickly from experimentation to everyday use across financial institutions from vendor tools and analytics to customer-facing applications and internal automation. But increased adoption also brings real risk: regulatory uncertainty, data exposure, model bias, third-party dependencies, and governance gaps that examiners are already starting to ask about.

This webinar cuts through the noise to focus on what safe and responsible AI use actually means in a financial services context. We’ll break down where AI risk most commonly shows up, how existing risk and compliance frameworks can be adapted to govern AI, and what practical guardrails institutions should put in place now — even as regulations continue to evolve.

You’ll leave with a clear, realistic understanding of how to enable AI innovation without creating unmanaged risk, reputational exposure or compliance surprises.

This session is designed for compliance, risk, IT, legal and business leaders who want to move forward with AI thoughtfully, defensibly and with confidence.

[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. Discover more at www.vfccu.org.