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For More Information Contact:

Cheryl Johnson, Cheryl Johnson PR
(913) 488-2710 • cheryl.johnson.pr@gmail.com

Vizo Financial's 2025 Financial Conference to Offer Valuable Industry Insights with Strong Lineup of Speakers

Greensboro, N.C. (July 23, 2025) – Vizo Financial's 2025 Financial Conference is set to offer an outstanding lineup of expert speakers.

On September 10-12, 2025, credit union attendees will have the opportunity to learn from industry experts from Bloomberg, Wells Fargo and other top-tier institutions. During the three-day event, which will be held at The Omni Grove Park Inn in Asheville, N.C., Vizo Financial looks forward to providing conference participants with networking opportunities and CPE credits, in addition to offering pertinent education sessions that will equip attendees with implementable strategies.

Conference speakers from several prominent financial and credit union-industry organizations include:

- Nicole Cervi, *Wells Fargo*
- Winnie Cisar, *CreditSights*
- Justin Conrey, *CU Business Group, LLC*
- Ira Jersey, *Bloomberg Intelligence*
- Juliya Kofman Greenfield, *RKL LLP*
- Chris Lomas, *Brean Capital, LLC*
- Hunter Meisenheimer, *Raymond James*
- Andrew Morris, *Americas CU*
- Barry Pelagatti, *RKL LLP*
- Caroline Vahrenkamp, *Filene Research Institute*

“This year’s conference provides engaging growth and learning opportunities,” said Scott Wood, SVP/chief investment officer for Vizo Financial. “As we were preparing for this conference, we organized a strong lineup of speakers to present on timely topics that credit unions are currently experiencing. I believe we’ve put together a top-notch financial education experience where attendees can gain insights and tangible benefits for the remainder of the year and into 2026.”

(More)

Educational sessions during the three-day event will cover a multitude of pressing financial topics including interest rate and loan performance strategies, economic and regulatory updates, investment and bond opportunities and much more.

Additionally, the conference will feature spa, golf and electric bike tour activities, valuable networking opportunities, CPE credits and, of course, a stunning mountain setting.

“Our 2025 Financial Conference is set to be our best yet,” said Jaime Agostino, VP, sales, marketing and education. “We’re excited to be welcoming first-rate presenters who will provide our attendees with valuable insights and practical action items that they can bring back to their institutions. Overall, we’re thrilled to be taking this event to new heights, offering exemplary, engaging education opportunities for credit unions.”

Past conference attendees recently shared their praise for the conference on Vizo Financial’s *Financial Minds: Meet the Experts* podcast, highlighting the benefits that credit unions will gain by attending the event.

“For anyone still deciding whether to register, don’t hesitate,” said Darrell Tyler with Richmond Heritage Federal Credit Union in a recent LinkedIn post. “This conference delivers actionable takeaways, strong peer connections and a broader perspective on the financial landscape. You won’t regret making the investment in your professional development.”

“Every time we go to this conference, our team brings something back,” said Phil Barnhill with Greenville Federal Credit Union. “That’s not always the case at every conference. We always learn something we can bring back to our teams to implement or have a good talking-point discussion about, so having that kind of track record is so important.”

To see the full agenda and learn more about the 2025 Financial Conference, please visit the [registration site](#). The deadline to register for this conference is August 29, 2025, and the hotel block deadline ends August 6, 2025.

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About Vizo Financial Corporate Credit Union

Vizo Financial Corporate Credit Union’s goal is to drive credit union success through proven EXCELLENCE, unmatched EXPERTISE and engaged PARTNERSHIPS. It is a state-chartered corporate credit union that serves CUSOs, leagues, chapters and more than 1,000 credit unions in the U.S. and Canada. Vizo Financial provides money management, payments, core processing and education solutions. For more information, please visit www.vfccu.org.