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Vizo Financial's July 2025 Education Calendar

Greensboro, N.C. (July 3, 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 July 2025.

Understanding ACH Operations Webinar

Joy Babcock, director of education, PaymentsFirst

July 8, 2025 at 10:00 a.m. ET

This session will provide a comprehensive introduction to the ACH Network.

Key topics that will be discussed include:

- Roles of key participants
- ACH processing flow
- Transaction types and flows
- Handling returns and exceptions
- Regulatory and compliance considerations
- Practical insights and best practices

This 90-minute webinar is designed for individuals new to ACH operations or those seeking to enhance their understanding of the ACH system's fundamentals, compliance rules and best practices.

[Learn More](#)

Managing in an Ever-Changing World Webinar

Joe Bertotto, SVP/chief culture officer, Vizo Financial

July 9, 2025 at 10:00 a.m. ET

In 500 B.C., the Greek philosopher Heraclitus said, “There is nothing permanent except change.” Even though those words were spoken over 2,700 years ago, they’ve never been more relevant than they are today. From transformations in technology and member habits to major updates in

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monetary policy and regulations, change is thrust upon us at a rapid and complex pace. Navigating those changes, while helping our team members deal with these disruptions, can be a daunting task.

Join Vizo Financial’s SVP/chief culture officer, Joe Bertotto, as he discusses time-tested approaches to managing the impact of change on yourself and your team so you can not only survive the changes you encounter, but thrive in the disruptive nature of today’s ever-evolving workplace.

This webinar is designed for credit union managers or anyone wishing to learn more about leadership and the challenges we face in an ever-changing world.

[Learn More](#)

BSA/AML Basics Compliance Training Webinar

Cindy Hagan, VP, compliance and fraud risk, Vizo Financial

July 15, 2025 at 2:00 p.m. ET

The NCUA requires Bank Secrecy Act (BSA) and Anti-Money Laundering (AML) training each year for credit union personnel. Fulfill this requirement by attending this webinar on the basics of BSA/AML.

This session will cover:

- BSA and AML regulations
- BSA and AML reporting requirements
- CTRs, SARs, 314(a) and member identification
- Changes to and considerations for the compliance landscape

This webinar is designed for all credit union staff who need to complete their yearly BSA/AML training.

The cost for this session is \$79.00 per registered attendee.

[Learn More](#)

The ABCs of SECs Webinar

Joy Babcock, director of education, PaymentsFirst

July 16, 2025 at 2:00 p.m. ET

This session provides a comprehensive overview of Standard Entry Class (SEC) codes used in ACH transactions, highlighting their specific purposes and authorization requirements. Participants will gain insights into the significance of SEC codes in ensuring compliance and effective transaction processing.

This session equips participants with the knowledge and tools needed to understand SEC codes, ensuring accurate transaction processing and compliance with regulatory standards.

[Learn More](#)

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

Sam Nevers, Vertice AI

July 24, 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 Symitar extracts?

In this webinar, discover how Vertice AI helps credit unions personalize engagement at scale by transferring data within 48 hours, going live in weeks and automating weekly data refreshes through the Jack Henry Vendor Integration Program (VIP). Through Jack Henry VIP, Vertice AI efficiently and repeatably extracts the data needed to enable their Solution without any PII needed.

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 peer credit unions who have leveraged the Symitar 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](#)

Quarterly Economic Insights Webinar

Scott Wood, SVP/chief investment officer, Vizo Financial

July 31, 2025 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 a credit union or anyone wishing to learn more about the state of the economy and its impact to the credit union industry.

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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’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.