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## Vizo Financial Celebrates a Successful 2025 Financial Conference

**Greensboro, N.C.** (September 24, 2025) – Vizo Financial’s 2025 Financial Conference had great attendance and received lots of positive feedback from attendees, making it another successful year for the Corporate’s largest annual educational event.

On September 10-12, 2025, Vizo Financial hosted a record number of credit unions attendees at the event, which was held at the Omni Grove Park Inn in Asheville, N.C. The conference centered around education sessions led by industry experts, several networking opportunities and fun activities including an electric bike tour, spa sessions and golf.

Several renowned financial and credit union-industry organization speakers led conference sessions this year:

- 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, *America’s Credit Unions*
- Barry Pelagatti, *RKL LLP*
- Caroline Vahrenkamp, *Filene*

“The 2025 Financial Conference was a resounding success,” said Scott Wood, SVP/chief investment officer for Vizo Financial. “We had a solid lineup of speakers from some of the industry’s top experts. They provided relevant insights to consider and key takeaways that conference attendees can implement in real-time at their organizations.”

During the three-day event, session topics covered credit union business lending practices, managing interest rate exposure, fixed income trends, navigating NCUA requirements and much more.

(More)

“We had an exceptional turnout this year, and the sessions were packed with lots of great information,” said Jaime Agostino, VP, sales, marketing and education. “The speakers were top-notch. They delivered valuable educational experiences for our attendees, and we received a lot of positive feedback once again this year. All in all, the 2025 Financial Conference was a highly impactful event, and we’re looking forward to hosting it again next year.”



Here’s what attendees shared about their experience at this year’s Financial Conference:

“Well organized, great communication throughout,” said Barbara Basallote-Hook of Tru Energy FCU. “Enjoyed the speakers - quality content and lots of great takeaways. The location was amazing!”

“Amazing job as always by Vizo [Financial],” said Amanda Wagner of Norwin Teachers FCU. “So much information and different viewpoints. The layout of the schedule was a perfect blend of educational time, networking and down time.”

“Always a well-organized event,” said Kathleen All of Jackson River Community Credit Union. “Glad my schedule aligned to return to the event this year.”

The 2026 Financial Conference will be held on September 16-18, 2026, at the Omni Grove Park Inn in Asheville, N.C.

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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).