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Vizo Financial Hits the Mark with 2017 Financial Conference

Greensboro, N.C. (Sept. 20, 2017) – On September 13-15, 2017, Vizo Financial Corporate Credit Union held their 2017 Financial Conference at the luxury Ballantyne Hotel and Lodge in Charlotte, N.C.

Employees from more than 45 credit unions attended the three-day conference, which included education sessions, golf and spa activities and networking opportunities.

Education sessions focused on many hot topics surrounding financial management, covering the economy, culture and commitment, ALM modeling, balance sheet and capital planning strategies, loan participations, investment portfolio, regulatory requirements and the big one on the horizon...CECL.

And who better to provide the education but experts from some of the most well-known financial organizations in the industry? The conference featured the following speakers:

- Deb Donaldson, Alpha-Numeric Consulting LLC
- Mike Schenk, CUNA
- John Murnane, Doeren Mayhew and Advisors
- Ryan Foss, Filene
- Ian Lampl, LoanStreet
- Joe Bertotto, MY CU Services
- Alexander Moterrubio, NAFCU
- Hunter Meisenheimer, Raymond James
- Ryan Henley, Stifel, Nicolaus & Co.
- David Brehmer, Vizo Financial
- Jay Murray, Vizo Financial

In addition to the education, attendees also enjoyed down time to explore the Ballantyne Hotel's world-class amenities, including luxury spa treatments and the PGA golf course. And there was plenty of time allotted for networking during the evening dinners and reception.

“The Financial Conference serves as a two-fold kind of event, with both the financial education and networking that our members need and the relaxing getaway type-feel that they want,” said Fred Eisel, chief investment officer for Vizo Financial. “From the feedback we’ve already

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received, it seems like the topics were right on target with what credit unions needed for their financial endeavors - particularly in the face of interest rate uncertainty and the emergence of CECL. I truly think we hit the mark with this year’s conference!”

Vizo Financial would like to thank all of our attendees, speakers and participants for making our 2017 Financial Conference so successful!

Vizo Financial captured highlights from the conference and testimonials from credit union employees who attended. Watch the video below to view the full recap of this great event.



Next year’s Financial Conference will be held on September 12-14, 2018, at the Ballantyne Hotel and Resort in Charlotte, N.C.

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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 1,200 credit unions in the U.S. and Canada. Vizo Financial provides money management, payments, technology, risk management and people development solutions. For more information, please visit www.vfccu.org.