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Elevating Financial Expertise: Vizo Financial Holds Annual Financial Conference in the Mountains of Asheville, N.C.

Greensboro, N.C. (October 23, 2023) – Vizo Financial’s 2023 Financial Conference was an exceptional event with eleven expert speakers and more than 100 attendees.

On September 13-15, Vizo Financial invited credit unions to join them at the Omni Grove Park Inn in Asheville, N.C. for educational sessions presented by industry experts, opportunities for networking and a celebratory retirement dinner for the Corporate’s president/CEO, David Brehmer.

The conference hosted speakers from a variety of renowned financial and credit union-industry organizations, including:

- Scott Buchta, *Brean Capital*
- Lori Carmichael, *Doeren Mayhew*
- Andi Crockett, *Vizo Financial*
- Jerry Clark, *Moody’s Analytics*
- Derek Fuzzell, *PAHO/WHO FCU & Bienestar Financial Investments*
- Dan Gonzalez, *Federal Reserve Financial Services*
- Jeanine LaBarbera, *Doeren Mayhew*
- Ann Petros, *NAFCU*
- Ellis Phifer, *Raymond James*
- Lindsey Piegza, *Stifel Nicolaus*
- Charles Vice, *NCUA*

“The financial community has experienced a roller coaster of highs and lows in 2023, and all of them have significantly impacted credit unions, their members and the overall economy,” said Scott Wood, SVP, chief investment officer of Vizo Financial. “The Fed paused rates; there were concerns about a recession; credit unions experienced, and still are experiencing, a tightening in liquidity — just to name a few. With all of this in mind we wanted to make sure that we offered sessions that touched on the specifics of these topics. I believe we accomplished that.”

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Education sessions over the three days covered investment and interest rate strategies for credit unions, trends in asset/liability and balance sheet management, the FedNow Service and instant payments, an update from Washington and so much more.

“Our staff put on an incredible event this year,” said Fred Eisel, executive vice president of Vizo Financial. “Not only were the educational sessions phenomenal, but multiple attendees commented on how much they loved the venue we chose too.”

In addition, a retirement party was held to celebrate David Brehmer’s long and accomplished credit union career. Those who worked alongside David over the past 25+ years, along with his friends and family, had the opportunity to share their fondest memories of David with those in attendance.

“Overall, we were very pleased with the new venue as well as the turnout, and we know our attendees were able to glean insights from the sessions that were held,” said Jaime Agostino, VP, sales, marketing and education. “This year’s conference was definitely a success, and it was a special event, since it was David’s last Financial Conference with the Corporate, so we enjoyed celebrating him as well.”

The 2024 Financial Conference will be held on September 10-13, 2024, 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’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 1,100 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.