CPE Credit(s) Disclaimer

This disclaimer is provided by Vizo Financial Corporate Credit Union to outline the terms and conditions for attendees seeking Continuing Professional Education (CPE) credits in association with the 2026 Financial Strategies Workshops.

CPE Credit Responsibility: Participants attending the 2026 Financial Strategies Workshops are responsible for ensuring their eligibility and compliance with CPE requirements.

Minimum Requirements: Vizo Financial Corporate Credit Union acknowledges its commitment as a National Association of State Boards of Accountancy (NASBA) sponsor and adheres to the minimum CPE credit requirements set forth by NASBA in the January 2024 Statement on Standards for Continuing Professional Education (CPE) Programs.

Participant Obligations: For attendees to earn CPE credits for participating in the 2026 Financial Strategies Workshops, they MUST fulfill the following requirements for Group-Live events:

- Attend each session for at least 50 minutes. If you miss too much time, it might affect how many credits we can award you.
    - **Responsibility to monitor attendance.** Although it is the participant's responsibility to report the appropriate number of credits earned, CPE program sponsors must maintain a process to monitor individual attendance at group programs to assign the correct number of CPE credits. NASBA reviews supporting documentation for time stamps and details on late arrivals, early departures and unscheduled breaks.
- Answer at least one polling question during each session through the Attendee Hub to show you're engaged and participating in the session. This can be done via your mobile device or computer.
    - Per the Standards, a group live program must include at least one element of engagement related to course content during each credit of CPE. If you are unable to answer the polls, please let the on-site Marketing Team staff member know.
- Fill out the survey after each session.

Failure to meet these requirements will disqualify attendees from receiving credit. Vizo Financial must monitor attendance to accurately assign CPE credits, as self-certification alone does not meet NASBA standards. We will make sure your attendance and participation are recorded and that you are credited appropriately.

Event Content and Certification: Vizo Financial does not guarantee the content of the event will meet the individual certification requirements, and participants should assess their relevance of the content to their professional development needs. As a CPE program sponsor, we will provide descriptive materials that enable CPAs to assess the appropriateness of learning activities and disclose any advanced preparation and prerequisites prior to the event on the registration site.

Changes and Updates: Vizo Financial reserves the right to update or modify this disclaimer and any associated CPE credit requirements as needed. Participants are encouraged to review the disclaimer and the CPE page on the registration site periodically for changes.

Contact Information: Vizo Financial Corporate Credit Union is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

Acceptance of Terms: By attending the 2026 Financial Strategies Workshops, participants acknowledge their understanding and acceptance of the terms outlined in this disclaimer regarding CPE credits and understand that Vizo Financial Corporate Credit Union's sponsorship is contingent on adherence to NASBA guidelines for CPE credits.

For additional information regarding the program, please contact the Vizo Financial Corporate Credit Union marketing team at marketing@vfccu.org.