



# 2026 Education & Events



The Payments Association  
that powers progress

*"We greatly value our relationship with ePayResources. Their payments knowledge and expertise are exceptional, and I know when I call the Payments Answerline, I will get superior advice.*

Amanda Schmitt, Vice President & Operations Manager, AAP, Bank of The James (members since 1976)

[epayresources.org](http://epayresources.org)



# Power the Future of Payments.

ePayResources is an extension of your team; we are your trusted go-to resource that empowers you to **LEAD WITH CONFIDENCE.**

Fraud. Compliance. Instant Payments. Our member benefits help you stay on top of these hot topics - and many more!

## **Payments Education**

Over 100 on-demand sessions provide countless hours of free education resources

## **Payments Answerline™**

Unlimited support via our Payments Answerline™

## **Exclusive Discounts and Services**

Free Nacha Rules Book, annual Early Bird Publications Sale, and scheduling & pricing considerations for ePayAdvisors' services

## **Fraud-Fighting Opportunities**

Fraud Meetings, Fraud Forum Community, Fraud Alerts, Financial Crimes Symposium, and more

## **Online Member Communities**

Networking and resource sharing in three online communities available to members

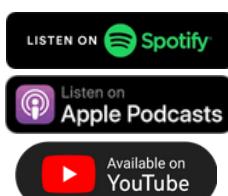
## **Professional Development**

Training for AAP, APRP, AFPP, and NCP exams, plus exclusive certificates, certification programs, and our ePayU Payments Degree



## **CONNECTIONS**

Insight for a new era of payments brought to you by the experts at ePayResources®



# CONNECTIONS happen here!



## MEMBER COMMUNITY

A private online payments networking community that facilitates discussion, networking, and collaboration among peers and ePayResources staff.

### Discussions

Engage with your peers and our experts on issues affecting your organization

### Blogs

Thought-provoking articles from staff and members on current issues impacting the payments industry

### Resources

Sample documents, informative links, educational videos, and other helpful tools

### Career Center

Share openings at your institution or explore opportunities from ePayResources and our members

## MORE MEMBER NETWORKING OPPORTUNITIES!

### FRAUD FORUM

The **Exclusive online community** designed for financial institution members to connect and work together on strategies to combat the latest payment fraud schemes.

### ORIGINATOR EDUCATION COMMUNITY

The **Originator Education Community** provides a space for corporate ACH Originators and the ODFIs, Third-Party Senders, and Third-Party Processors that support them to network and to stay informed and compliant with the Nacha Operating Rules.

# On-Demand Education



Payments Education  
24/7/365

## OVER 100 ON-DEMAND COURSES



From microsessions to certificate programs, we've got what you need to stay compliant and competitive - and lead with confidence! Most courses are available at no charge to our financial institution members.

**See complete course catalog and get started at  
[epayu.epayresources.org](http://epayu.epayresources.org)**

### ePayU Premium Professional Development Content

These proprietary programs features multiple courses and thorough learning assessments to ensure your success.

ePayU  
Payments Degree

ACH Certification  
Program

Introduction to BSA  
Certificate Program

Introduction to Cards  
Certificate Program

# Featured Workshops

In-Person and Virtual

Hit the ground running in 2026!

Don't miss

## Payments Systems Update

1/29 - Denver with ICBC

1/29 - Austin with TBA

2/5 - Albuquerque with ICBANM

2/11 - Tallahassee

2/19 - Baton Rouge with FNBB

3/10 - Virtual

The payments industry never stops changing, creating an ongoing challenge for financial institution personnel to stay on top of rules and regulations, especially as they relate to instant payments and relationship with third parties. It's a lot, but we can help you master it with the Payments Systems Update! Don't miss this one-day session to learn the latest in **ACH, Check, Cards, Wire, RTP, and FedNow!** Earn up to 6.6 continuing education credits for AAP, AFPP, and APRP (NCP pending).



### ACH Boot Camp - Fundamentals

This workshop provides an introduction to the ACH Network with an in-depth review of the essentials for compliant ACH operations.

**March 17 - 18 with TBA & ICBC - Virtual**

**June 9 - 11 with ICBC - Virtual (3 half days)**

**April 8 - 9 with FNBB - Virtual**

**October 21 - 22 with FNBB - Virtual**

### ACH Boot Camp - Compliance Specialist

This intermediate-level workshop focusing on risk mitigation explores new ACH Rules and the options to implement these changes successfully.

**May 20 - 21 with FNBB - Virtual**

**December 8 - 10 with TBA & ICBC - Virtual (3 half days)**

### Payments Risk Master Class

This 2-day intensive class is designed to elevate your organization's security across payments channels.

**May 12 - 13 with TBA and ICBC - Virtual**

**November 18 - 19 with ICBC - Virtual**

### Check Systems Investigation: CSI

Turn your knowledge of check law into investigative skill! In this hands-on session you'll unravel a real-world scenario where duplicate images, counterfeit creation, and late returns collide.

**September 24 - Virtual**

Dates subject to change. See complete details and register at

 [epayresources.org/store](http://epayresources.org/store) 

# Featured Live Webinars

Miss a live webinar? No worries! Look for the recordings in ePayU!

**ACH Rules Update** January 21 with ICBC

**Federal Reserve Bank: Fraud & Scam Classifier Models** March 3

**Federal Reserve Bank: FedDetect Service** April 14

**Federal Reserve Bank: Exception Resolution Service (ERS)** May 7

**Federal Reserve Bank: Business Continuity** June 16

**Federal Reserve Bank: FedPayments Insights** July 1

**Your Debit Card Dispute Is Not Fraud: Now What?** March 11

**Debit Card Disputes, Part 1: Regulation E** March 25

**Debit Card Disputes, Part 2: The Global Networks' Rules** April 1

**The Green Book: Benefit Payments** June 4

**The Green Book: Reclamations** June 11

**The Green Book: Treasury Check Reclamations** June 25

**Preparing for a Payments Audit** August 11

**Top Payments Audit Findings** August 20

**NEW**

**Payments Leadership Series: Fueling Innovation, Strategy, and Vision**  
**(3 Sessions: June 11, 18, and 25)**

brought to you by ePayResources and EPCOR

As digital transformation reshapes the payments landscape, leaders must stay ahead of emerging trends, evolving regulations, and new opportunities. This virtual series helps payments leaders turn industry insight into strategic action with interactive discussion led by influential speakers.

**June 11: Stablecoins - From Concept to Execution**

**June 18: International Payments & FX - Strategy, Risk, and Opportunity**

**June 25: Executive Roundtable - Applying Payments Trends to Your Strategy**

Dates subject to change. See complete details and register at

 [epayresources.org/store](http://epayresources.org/store) 

# National Accreditation Preparation Programs

Earning a professional accreditation in the payments industry demonstrates your broad foundation of knowledge, your credibility as an expert, and your commitment to excellence. ePayResources can help you accomplish your goal of earning the Accredited ACH Professional, Accredited Faster Payments Professional, Accredited Payments Risk Professional, or National Check Professional designation with our intensive exam preparation programs.



*I could not have passed this test without ePayResources' Power Pack preparation program. Everything was always positive, easy to understand, and relatable. ePayResources made an extremely intimidating test seem approachable and achievable. I recommend this program!*

Megan Burchett, AAP  
Deposit Operations Manager  
BayPort Credit Union



[epayresources.org/education](http://epayresources.org/education)



National Check Professional

## Customized Education

**Not seeing exactly what you are looking for?**

**Want an economical and convenient alternative  
that can fit your specific needs and schedule?**

**Let ePayResources design and deliver  
customized education  
on any payments topic for your:**

- Upper management
- Board of Directors
- Corporate Originators
- Call center or branches
- and more!



**Contact Wanda Downs, SVP, Payments Education  
at [wdowns@epayresources.org](mailto:wdowns@epayresources.org) for more info!**



[epayresources.org/paymentsuniv](http://epayresources.org/paymentsuniv)

August 6 - 7, 2026  
FL or NC (TBD)

August 27 - 28, 2026  
Texas

September 10 - 11, 2026  
Virtual

# Annual Conferences



[epayresources.org/fcs](http://epayresources.org/fcs)

October 21, 2026  
Virtual

## ePayCONNECT®

FEBRUARY 23 - 25, 2026

**MONUMENTAL IDEAS:**  
Powering Progress & Possibility

**Gaylord National Harbor**

Maryland / D.C. Metro

Our 30th Annual Payments Conference  
30+ Sessions • 17.5 CE Credits

The logo for ePay resources, featuring the word 'ePay' in a white sans-serif font with a small sun-like icon above it, and 'resources' in a smaller white sans-serif font below it.

AI & Automation • Fraud Prevention • Instant Payments • Pay by Bank  
Digital Currency • Compliance Shifts • Economy & Policy

Save the date for ePayConnect 2027 in San Antonio, TX!  
March 1 - 3, 2027 at the Kimpton Santo Riverwalk / Plaza San Antonio

Learn more and register at [epayconnect.org](http://epayconnect.org)

# 2026 Education & Events Pricing

Subject to change; visit [epayresources.org/store](http://epayresources.org/store) for updates and to register.

Education Type	Member Pricing	Non-Member Pricing
<b>ePayU</b> Webinars & On-Demand Content	<b>FREE</b> for full financial institution members and ePayU subscribers <b>\$195 pp</b> for member non-subscribers <b>\$595 group rate (5 attendees)</b> for member non-subscribers	<b>\$495 per person</b>
<b>ePayU</b> Premium Webinars & On-Demand Content	<b>\$195 - \$245 pp</b> <b>\$595 - \$695 group rate (5 attendees)</b>	<b>\$395 - \$495 pp</b>
<b>Virtual One-Day Workshops</b>	<b>\$245 pp</b> <b>\$645 group rate (5 attendees)</b>	<b>\$445 pp</b>
<b>Virtual Two-Day Workshops</b>	<b>\$445 pp</b> <b>\$1,245 group rate (5 attendees)</b>	<b>\$845 pp</b>
<b>In-Person One-Day Workshops</b>	<b>\$275 pp</b>	<b>\$525 pp</b>
<b>In-Person Two-Day Workshops</b>	<b>\$525 pp</b>	<b>\$925 pp</b>
<b>Payments University</b>	<b>\$525 pp, virtual or in-person</b>	<b>\$925 pp</b>
<b>ePayConnect</b> <i>Include your guest for meals and receptions for just \$250 pp!</i>	<b>\$895 pp</b>  <i>ePayConnect group discounts for members and non-members: \$100 off 2nd attendee from same organization; \$150 off 3rd attendee; \$175 off 4th or more additional attendees from same organization.</i>	<b>\$1,495 pp</b>
<b>Financial Crimes Symposium (Virtual)</b>	<b>\$325 pp</b>  <i>Complimentary for Law Enforcement registrants up to 2 per agency; \$70 per LE registrant after that.</i>	<b>\$650 pp</b>
<b>AAP, AFPP, APRP, or NCP Exam Prep:</b>  <b>Orientation</b>  <b>Webinar Series</b>  <b>Review Course</b>  <b>Power Pack (includes Orientation, Webinar Series, Review, publications)</b>	  <b>\$95 pp; \$295 group rate (5 attendees)</b>  <b>\$995 pp</b>  <b>See Virtual and In-Person Workshop pricing above for Review Course pricing; AAP &amp; NCP = Two-Day / APRP &amp; AFPP = One-Day</b>  <b>\$1,795 pp for AAP</b> <b>\$1,295 pp for AFPP, APRP, or NCP</b>	  <b>\$295 pp</b>  <b>\$1,495 pp</b>    <b>\$3,495 pp for AAP</b> <b>\$2,595 pp for AFPP, APRP, or NCP</b>
<b>ACH Certification</b>	<b>\$1,595 pp</b>	<b>Only available to members</b>
<b>Introduction to BSA Certificate Program</b>	<b>\$795 pp</b>	<b>\$1,495 pp</b>
<b>Introduction to Cards Certificate Program</b>	<b>\$495 pp</b>	<b>\$995 pp</b>
<b>ePayU Payments Degree</b>	<b>\$1,995 pp</b>	<b>\$3,895 pp</b>
<b>Pants on Fire: Spot Fraud Like the Experts</b>	<b>\$395 pp</b>	<b>Only available to members</b>

# Payments Publications

Staff across your organization rely on accurate, practical guidance in convenient formats to provide plain-language explanations for complex rules that support compliant decision-making.

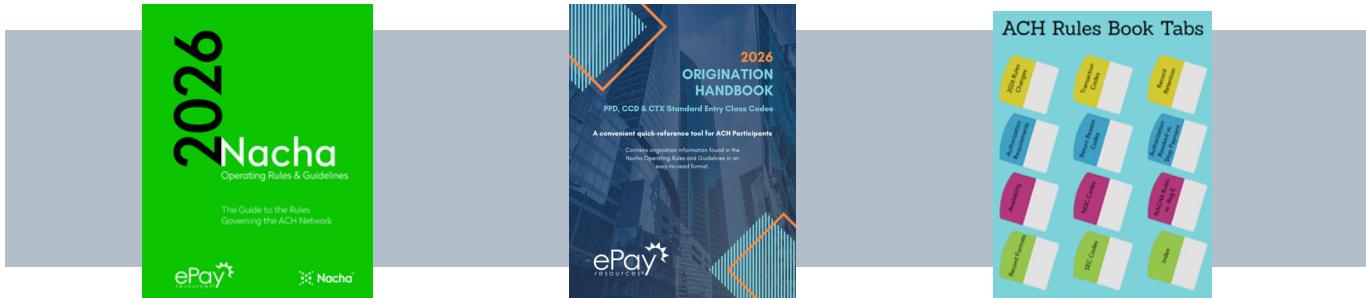
These pages present publications organized by topic and indicate what education courses complement them. See more details on all our publications and place your order in our Online Store at [epayresources.org/store](http://epayresources.org/store).

## ACH Rules:

- Nacha Operating Rules and Guidelines
- Origination Handbook Series: PPD; CCD & CTX; PPD/CCD/CTX combo; TEL/WEB/CIE; Check Conversion; Returns, Reversals, and Reinitiations
- Rules Book Tabs
- Nacha Operating Rules and IDA AI Companion

## Pairs Well With These Courses:

- ACH Rules Update
- ACH 101
- ACH 201
- ACH Operations
- ACH Origination
- ACH Exception Handling
- ACH Risk Mitigation
- ACH Exceptions



## Professional Development:

- AAP/AFPP/APRP/NCP Flashcards
- AAP/AFPP/APRP/NCP Publication Kits

Our Power Packs includes publications AND education courses for complete exam preparation!  
Learn more at:

[epayresources.org/education](http://epayresources.org/education)

## Pairs Well With These Courses:

- ACH Certification Program
- BSA Certificate Program
- Cards Certificate Program
- ePayU Payments Degree
- RTP Certification Program



## Compliance and Risk:

- ACH Rules Compliance Audit Toolkit
- ACH Risk Assessment Workbook
- TPS ACH Audit Workbook
- ProceduresNow! Policies and Procedures for ODFIs and RDFIs

**Need help conducting  
a thorough audit or  
risk assessment?**

Request a  
service proposal  
at [epayadvisors.com](http://epayadvisors.com)

## Forms and Agreement Templates:

- Stop Payment Form
- Written Statement of Unauthorized Debit Form
- AgreementsNow! (Positive Pay, Wire Transfer, RDC, TPS & many more!)

## Quick Reference Guides:

- Return Reason Code Guide
- SEC Code Guide
- FedNow Message Type Quick Reference Guide
- RTP Message Type Quick Reference Guide

## Pairs Well With These Courses:

- Fighting Fraudulent Tax Return Payments
- Nacha's Proof of Audit Process Change
- Preparing for a Payments Audit
- Micro-Entries: What They Are and What They're Not
- Reversing Files and Entries
- Top Audit Findings in Payment Systems
- What's in a Name - Classifying ACH Entries



## Forms and Agreement Templates:

## Pairs Well With These Courses:

- Completing a Stop Payment Form
- Completing a WSUD Form
- Stop Pay vs. WSUD

## Quick Reference Guides:

## Pairs Well With These Courses:

- Types of Entries
- R10 vs. R11
- Appendix 4

See all our education and publication offerings  
in our Online Store at [epayresources.org/store](http://epayresources.org/store)



# Trusted experts help protect and grow your payments business

## AUDITS

- ACH for Financial Institutions
- ACH for Third Parties
- Mobile Deposit Capture
- Merchant RDC
- Wire Transfer
- RTP®
- FedNow®
- Zelle®

## RISK ASSESSMENTS

- ACH for Financial Institutions
- ACH for Third Parties
- Wire
- Mobile Deposit Capture
- Merchant RDC
- Instant Payments

Our clients  
are saying:

“A standout partner”  
“Top-notch team”  
“Above and beyond”

Learn more, request a free quote, book an engagement

in f



800-475-0585  
Option 5



info@epayadvisors.com



epayadvisors.com

# Customized Consulting

ePayAdvisors provides in-depth analysis and thorough reports with the expert insight needed to position you for success.

Don't see what you need? Just ask and we will craft a custom solution!

**Originator Compliance Review**

**ACH Origination Program Implementation**

**Instant Payments Readiness**

**Policy and Procedure Review**

**Reg E and Other Non-Traditional Audits**

**New Product Implementation**

**Payments Strategy**



Their transparency and openness created a sense of trust and confidence in their capabilities. I wholeheartedly recommend ePayAdvisors to any organization seeking ACH origination program implementation support. Their professionalism, technical expertise, and customer-focused approach made ePayAdvisors a standout partner in the realm of financial services technology. We look forward to continuing our collaboration on future projects.



- GECU

# Find what you need with A.I.

ePayResources has partnered with Nacha and Identifee to offer exclusive members-only pricing to access the Nacha Operating Rules & Guidelines through AI!



OMG! What took me 4 hours took IDA 4 minutes.  
**#WorkSmarterNotHarder**

IDA is not a replacement for the Nacha Operating Rules & Guidelines and IDA users must obtain the latest version of the Nacha Rules from ePayResources or nacha.org. Nacha is not responsible for decisions based on the IDA AI bot and has not reviewed or endorsed any content from this website or service.

Ask IDA questions, get answers instantly!



Ask me any questions about the Nacha Operating Rules and Guidelines.

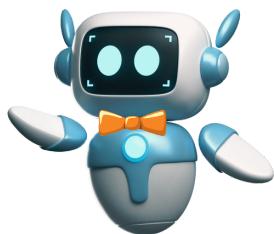


Summarize this section for me in 3 bullet points.

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Contact the ePayResources Membership Team to get started at [membership@epayresources.org](mailto:membership@epayresources.org).



## Ask ePayAssist

The Electronic Payments Resource™



Navigate your ePayResources member journey and easily find the products, services, and tools you need.

ePayAssist maximizes your experience by helping you find the information and resources you need quickly when you visit our website. Click on the chatbot icon in the lower right corner at [epayresources.org](http://epayresources.org) to start a chat or send a message.



# An Extension of Your Team



ePayResources is our one stop shop for all our payments education needs! They make it easy to find the answers to our questions. The education that ePayResources provides has been invaluable to our staff.



Kathy Gross, AAP, Accounting Supervisor  
FivePoint Credit Union



The customized training session was really helpful. It was designed just for our team, so everything we learned was relevant and easy to apply. The trainer explained things clearly and answered all of our questions.



Cindy Minchew, VP, Deposit Operations Manager  
KS Bank, Inc.



The services offered by ePayResources have been invaluable. The structure and depth of the webinar series, paired with the supporting materials, provided a strong foundation to build on and helped make a complex subject much more approachable and engaging.



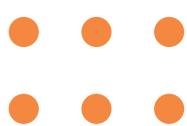
Jason Mendoza, AAP, NCP, Senior EFT Specialist  
Henrico Federal Credit Union



The AAP training program makes a difference. The discussions about real world scenarios allow you to better understand the concepts and apply your knowledge rather than simply reading and memorizing. ePayResources does a fantastic job breaking down the details, offering mnemonics and study tips, and providing guidance on areas of focus and exam topics. I would absolutely recommend the program to anyone studying for the AAP exam.



Lauren O'Laughlin, AAP, APRP, Operations Officer  
Cogent Bank





125 E. John Carpenter Fwy  
Suite 950  
Irving, TX 75062

[epayresources.org](http://epayresources.org)



# Ask ePayAssist

The Electronic Payments Resource™

**800-475-0585**

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ePayAdvisors  
Option 5

Accounts Payable & Invoices  
Option 6

