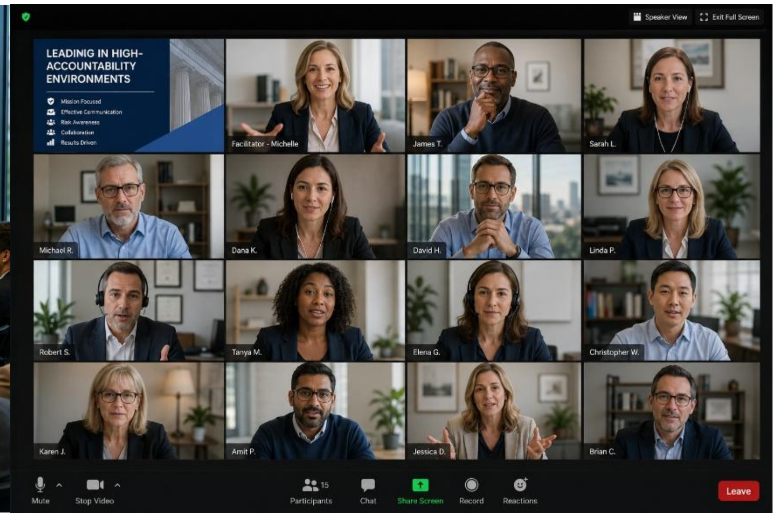
Generationology 2027 - Empowering Regulated Financial Services through Leadership and Professional Development

Virtual & In-Person Leadership and Professional Development Workshops for Regulators



At Generationology LLC, we help financial regulators and self-regulatory organizations strengthen leadership, collaboration, and day-to-day effectiveness in high-accountability environments. Our virtual and in-person programs are built for teams that operate under scrutiny—where clear communication, cross-functional alignment, and resilient cultures directly support oversight and market integrity.

Over the past several years, we've partnered extensively across the regulatory community, including the Office of the Comptroller of the Currency (OCC) (Bank Examiner training), the Securities and Exchange Commission (SEC) (staff development series), the National Credit Union Administration (NCUA) (eight workshops at the national conference plus a full-day session with its 55-person executive team), and the Federal Housing Finance Agency (FHFA). These engagements have sharpened our ability to design learning that fits the cadence, constraints, and mission focus of regulatory organizations.

Our flagship Intergenerational Collaborative Intelligence™ framework addresses one of the sector's most persistent realities: multi-generation teams charged with complex, time-sensitive work. We give supervisors, examiners, attorneys, analysts, and operations leaders practical tools to reduce friction, improve collaboration, and strengthen supervisory effectiveness without losing speed or rigor.

Every workshop is highly interactive and role-relevant, with scenarios and exercises tailored to regulatory contexts (and, for SROs, adaptable for member education tracks). Whether delivered virtually, on-site, or hybrid, sessions are designed to elevate communication, deepen trust, and sustain performance across teams that span functions, levels, and generations.

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Below is a list of our workshops. If you have questions, want a write up of a specific workshop, or would like to book a session, feel free to call or text us at 303-569-6143:

Intended Audience	*Name of Course*
All Employees	Across Generations - Learning to Lead, Listen, and Work Together
All Employees	Navigating Change: Thriving During a Leadership Transition
Executives and Leaders	Winning Workforce Support and Buy-In During Times of Change or Transition
All Employees	Unleashing Collaborative Excellence in a Remote or Hybrid Workplace
Executives and Leaders	“Unlocking the Power of We” – Building and Sustaining High Performing Teams
Executives and Leaders	"Championing Support: Strategies for Empowering Others in the Workplace"
All Employees	How to Give, Receive, Solicit, and Experience Precision Feedback as a Line Employee or Leader
All Employees	Fostering Civility and Camaraderie: Building a Respectful and Connected Workplace
All Employees	“The Currency of Trust” – How to Value, Build, Invest and Spend It
All Employees	Self-Regulation and Self-Care for Leaders and Employees
Executives and Leaders	Practicing the Art of Intergenerational Engagement and Managing Intergenerational Change in Regulated Financial Services
All Employees	How to Practice and Promote Team Psychological Safety in Regulated Financial Services
All Employees	"Permission to Reset" - How to Overcome Self-Criticism, Doubt, and Fear
All Employees	“A Letter to my Younger Self” – How to Lead through Introspection and Self-Reflection.
All Employees	Enhancing Online and In-Person Presentation and Briefing Skills for Financial Services Executives
All Employees	"Thriving Together” - Connecting and Collaborating in a Remote Workplace
New Leaders	Leadership Skills for Emerging Leaders in Regulated Financial Services
All Employees	“Starting Things Off Right” – Strengthening Onboarding and Early Employee Engagement

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Intended Audience	*Name of Course*
All Employees	"Reposition that Mirror" – How to Envision and Reflect the Habits, Behaviors, and Systems of a Rising Leader
All Employees	Mentoring That Works: Strengthening Development and Impact in Regulated Environments
Executives and Leaders	Transition Excellence: Moving with Confidence from Contributor to Leader
All Employees	How to Validate, Establish, Practice, and Experience New and Emerging Remote, Hybrid, and In-Person Workplace Norms
All Employees	Strengthening Workplace Relationships Through Clear Communication
All Employees	Preparing for Career Growth Through Discipline, Consistency, and Professional Habits
Executives and Leaders	Leading and Managing Across Generations
Executives and Leaders	The Leadership Apology: Repairing Trust and Restoring Relationships
All Employees	Enhancing Collaborative Intelligence™: Working Effectively Across Perspectives
All Employees	Working Across Generations: Turning Differences into Strengths
All Employees	Communication Foundations: Building Trust and Collaboration at Work
Executives and Leaders	How to Become a Trusted Intergenerational Leader
All Employees	Getting to Know Me: Understanding Your Strengths, Growth Areas, and Leadership Potential
Executives and Leaders	The Humble Leader: Leading with Influence, Growth, and Connection
All Employees	Unleashing the Leader Within: Unlocking Your Leadership Capacity
Executives and Leaders	Communication Foundations for Current and Emerging Leaders
New Leaders	Building Leadership Excellence: Essential Tools for New Leaders
Executives	Executive Leadership in Regulation: Leading with Strategy and Influence
All Employees	The Power of Intergenerational Communication: Shaping Trust Through What You Say
All Employees	Owning Your Career Journey – Building Effective Development Plans and Leadership Pathways
All Employees	Confidence at Work and Beyond: Building Presence and Professional Strength

Generationology 2027 - Empowering Regulated Financial Services through Leadership and Professional Development

Intended Audience	*Name of Course*
Executives and Leaders	Coaching Employees Through Effective Individual Development Planning
New Leaders	Winning at Work - Leadership Strategies for High-Potential Professionals
All Employees	Setting and Achieving Personal and Professional Goals
Executives & Leaders	Driving Engagement: Strategies to Improve Survey Scores and Team Morale
All Employees	Next-Level Listening: Advancing Communication in Regulated Environments
All Employees	Smart Social Media: Building Presence While Protecting Your Career
New Leaders	Equipping the New Leader: Tools to Lead in Financial Services
Executives and Leaders	Purposeful Leadership: Creating and Sustaining a Mission-Driven Workforce
All Employees	Strengthening Ideas, Respect, and Trust in Performance Conversations
All Employees	"The Power of Presence" – Strengthening Your Effectiveness in Virtual Environments Through Presence and Presentation Skills
All Employees	Strengthening Connections in Hybrid Work Environments
All Employees	Flourishing in Hybrid Work: Thriving in Virtual and In-Person Settings
Executives and Leaders	Strategic Communications for Leaders: Inspiring Teams and Driving Outcomes
All Employees	The Power of Pivot: Identifying and Executing Smart Shifts in Work and Life
All Employees	The Dance of Opportunity: Seizing Leadership Moments in Financial Services
All Employees	Strengthening Communication and Stakeholder Engagement in Regulatory Environments
All Employees	Leading After Change: Rebuilding Morale, Engagement, and Productivity
Executives and Leaders	The Art of Building a Multigenerational Leadership Culture
All Employees	Leading Through Compliance Without Losing Culture
All Employees	Creating a Service-Oriented Culture in High-Accountability Environments
All Employees	Do Something That Moves You – Setting Goals That Support Career Growth and Leadership Development

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Intended Audience	*Name of Course*
Executives and Leaders	Crisis-Ready Leadership – Navigating the Unexpected with Confidence
All Employees	Mentoring Within and Across Different Age Groups and Levels of Experience
All Employees	Developing Your Leadership Energy – How to Identify, Build, and Unleash Your Leadership Energy and Become the Most Positive, Present, and Engaged Person in the Room

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Why Financial Regulators and SROs Choose Generationology

We Know This Community—Because We've Led Within It

Generationology brings something different to the financial regulatory community: firsthand executive experience leading learning and workforce development from inside a federal financial regulator.

Generationology founder Jeffrey Vargas served for seven years as Chief Learning Officer of the U.S. Commodity Futures Trading Commission (CFTC), where he led enterprise learning, technical and regulatory training, leadership development, executive coaching, mentoring, and workforce capability-building.

Jeffrey wasn't observing the workforce challenges facing a financial regulator from the outside. He was responsible for helping solve them.

He worked directly with agency leadership to identify capability gaps, strengthen leadership readiness, develop critical talent, and ensure CFTC professionals had the knowledge and skills required to carry out an increasingly complex regulatory mission. He also served as a strategic advisor to the CFTC Chairman on leadership readiness, succession, capability gaps, and workforce development priorities.

We know what financial regulators and SROs need because we have done this work from inside the regulatory community.

Building the Workforce Capability the Mission Requires

When the CFTC assumed significant new responsibilities in the swaps marketplace, its workforce needed new technical and regulatory knowledge, and it needed it quickly.

Jeffrey led the development of the CFTC School of Swaps, building the learning ecosystem in just eight months in direct response to Congressional requirements. It became an industry benchmark for financial oversight training and helped equip CFTC professionals with the technical and regulatory knowledge required to oversee an extraordinarily large and complex marketplace.

He also designed enterprise Strategic Learning Plans that aligned development priorities with the agency's mission, strengthened bench strength for technical and leadership roles, and guided capability-building across CFTC divisions.

That experience continues to shape our approach today. Markets change. Technology changes. Regulatory responsibilities evolve. AI is changing how work gets done.

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Developing Leaders and Preserving Institutional Knowledge

Financial regulators and SROs are filled with accomplished examiners, attorneys, economists, analysts, investigators, technologists, and other specialists. Developing that expertise is critical. So is preparing those professionals to lead others and ensuring that institutional knowledge moves from one generation to the next.

At the CFTC, Jeffrey created the Chairman's Learning Circles, an internal knowledge-sharing ecosystem that empowered agency subject-matter experts to teach their colleagues. Developed in just 60 days, the initiative produced 41 learning programs in its first seven months and helped embed continuous learning and peer-to-peer knowledge sharing across the agency.

He also expanded executive coaching participation from approximately 20 percent to more than 75 percent in two years, strengthening senior leader development and establishing a strong coaching culture within the agency.

Within the Division of Enforcement, mentoring participation increased from approximately 35 percent to more than 75 percent in two years—even as Enforcement professionals were engaged in major multibillion-dollar investigations, including the LIBOR interest-rate manipulation case.

Those experiences reinforced something we continue to bring to our work today: leadership development, mentoring, succession, and knowledge transfer are not separate from the mission. They are part of sustaining the workforce capable of delivering it.

We Understand the Financial Regulatory Workforce

Financial regulatory professionals work in highly specialized environments where technical expertise, professional judgment, accountability, and credibility matter.

Examiners, economists, attorneys, investigators, analysts, technologists, policy professionals, supervisors, and executives may bring very different expertise to the organization, but they still have to communicate across functions, collaborate, give and receive feedback, develop others, build trust, transfer knowledge, and navigate change.

Generationology strengthens those capabilities through leadership and professional development focused on communication, feedback, trust, collaboration, psychological safety, intergenerational effectiveness, mentoring, knowledge transfer, and change readiness.

Our workshops respect the experience and intelligence people bring into the room. They are interactive, practical, and designed to create conversations and learning that participants can use when they return to work.

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This Is Our Community

Our financial regulatory experience did not end when Jeffrey left the CFTC.

Generationology has continued working across the financial regulatory community, including delivering leadership and professional development programs for organizations such as the U.S. Securities and Exchange Commission (SEC) and the Office of the Comptroller of the Currency (OCC).

That combination matters.

We have built technical learning in response to new regulatory responsibilities. We have developed executives and emerging leaders. We have created mentoring and knowledge-sharing systems. We have addressed succession and institutional knowledge. We have advised at the highest levels of a federal financial regulatory agency. And we continue developing professionals across this community today.

Generationology has delivered more than 60 leadership and professional-development programs to more than 50,000 professionals across 70+ organizations, maintaining an average participant satisfaction rating of approximately 4.8 out of 5.

When it comes to financial regulators and SROs, however, our experience goes deeper than numbers. We know this community, understand the workforce, understand the responsibility that comes with the mission.

And we know how to develop the people entrusted with carrying that mission forward.

Ready to Strengthen Your Workforce?

You know your organization, your people, and where greater leadership capability could make a difference.

Let’s talk about it. Tell us what you want to strengthen, and we’ll help you identify the right learning experience for your workforce.

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