Bonnie Treichel, JD

Chief Solutions Officer

Bonnie Treichel is the Founder and Chief Solutions Officer of Endeavor Retirement. With her experience as an ERISA attorney, financial advisor and plan sponsor, Bonnie knows first-hand the complexities and challenges of the US retirement market. She founded Endeavor Retirement to put her expertise to work to solve problems for professionals throughout the retirement industry.

Bonnie is a 2022 On the Rise—Top 40 Young Lawyers honoree of the American Bar Association.

Why You Should Book Bonnie

Bonnie is a sought-after thought leader and speaker on the latest developments in the retirement industry at major industry and company conferences. Audiences trust Bonnie not only to decipher rapidly evolving regulatory and industry trends, but to explain in accessible, practical terms what they mean for the day-to-day running of retirement plans. She also designs and facilitates customized advisor training sessions and boot camps eligible for CE credit.

Speaking Highlights

Bonnie is featured frequently in the media, from The Wall Street Journal to top retirement industry publications such as NAPA Net Daily and 401(k) Specialist. She is also a headliner and panelist at major industry events.

Let's Dive In: Sample Topics

Bonnie is available as a keynote speaker, moderator or panelist providing in-depth insights on the hottest topics in the retirement industry, including:

- **ESG:** Learn how plans can responsibly add ESG to their investment lineups
- **Retirement income:** Gain proficiency in the latest investment offerings in this rapidly growing area
- **Cybersecurity:** Understand why and how plans need to protect plan-participant data and assets
- **Cryptocurrency:** Get beyond the hype and learn how crypto will (or won't) be part of defined contribution plans
- **Managing fiduciary risk:** Learn how to create a governance framework that will simplify the work of advisors and plan sponsors
- **Regulatory & industry trends:** Understand how the PTE 2020-02 requirements & SECURE 2.0 will reshape retirement business—and how you can be ready

About Endeavor Retirement

Endeavor Retirement is on a mission to simplify governance so advisors and their plan sponsor clients are empowered to help participants maximize savings for a successful retirement.

Through its signature online Navigator platform, Endeavor Retirement provides financial advisors and their plan sponsor clients with a repeatable, adaptable and scalable framework of knowledge and tools to simplify plan governance, save time, and better manage fiduciary risk.

Book Bonnie

Request fees and availability

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Featuring Bonnie Treichel, JD

Chief Solutions Officer, Endeavor Retirement

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Title/Topic	Conference/Publication	Date
Your Capitol Hill Update: SECURE 2.0, Cryptocurrency, Fiduciary Standards & More	Retirement Plan Advisory Summit	09.27.22
Fi360/Retirement Income Consortium Webinar	Broadridge	09.29.22
ESG Mission Driven	ERISA 403(b) Conference-Washington, D.C.	10.03.22
Mental Health & Uncertainty: Normalizing the Conversation	WIPN	10.06.22
CEFEX Analyst Training: DOL Cybersecurity	Broadridge	10.11.22
Reimagining Retirement Series (M&A)	Endeavor Retirement	10.12.22
On The Money: What's Driving the Demand for In-Plan Retirement Income Solutions	Income America	10.25.22
What is ESG?	PlanSponsor	11.10.22
RISA Advisory Board	Business Wire	11.21.22
Mental Health Webinar with Melissa Doman	WIPN	11.30.22
Advisers Should Comment, Prepare Vendor List Ahead of SEC Outsourcing Rule	PlanSponsor	11.30.22
The Future of Retirement Income: A Q&A With Endeavor Retirement's Bonnie Treichel	PlanAdviser	12.05.22
LEAD THE CHANGE in Lifetime Income	Lead the Change- Nuveen (TIAA)- Arizona	12.08.22
Top Trends in Qualified Plans	(Carson/Pimco) FPA Annual Conference - Retirement Pre-Conference Session-Seattle, WA	12.11.22
First Look: A Fiduciary-Focused Framework for Retirement Income Solutions	Broadridge	12.15.22
ReThink Target Date Funds; Income Matters	Dimensional Fund Advisors	12.15.22
Lifetime Income	National Meeting (Columbia)-Boston, MA	12.16.22
Is the Starter-K the Jumpstart Retirement Plan Coverage Needs?	The Street	12.19.22
Tax Section	American Bar Association	Winter 2022

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