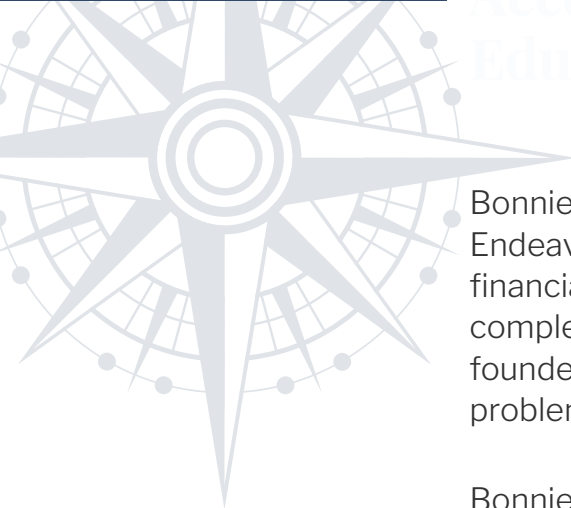




## Bonnie Treichel, JD

Chief Solutions Officer

Retirement Financial Advice &  
Education for the Retirement Industry



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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# Recent Speaking Events Featuring Bonnie Treichel

Title/Topic	Conference/Publication	Date
 Webinar 1: Fiduciary Fundamentals: An Overview of ERISA Fiduciary Status	NAPA	01.02.23
 Empower Coffee Tal(k) - Current Landscape of Lifetime Income in DC Plans	Columbia	01.12.23
 Bonnie Treichel Talks Retirement Income Solutions, New ESG Rule and SECURE 2.0	401kSpecialist	01.17.23
 Fi360 Presenter Details Fi360 CE Webinar	Broadridge	01.18.23
 Illuminating Lessons for Plan Sponsors on Fiduciary Responsibilities	2023 RIAC Conference	01.19.23
 SECURE 2.0: A Perspective for Retirement Plan Practitioners	Endeavor Retirement	01.31.23
 SECURE Act 2.0: Actions Items for Plan Sponsors in 2023 and Beyond	Cornerstone Companies	02.01.23
 Secure 2.0	Viking Cove Advisor Alliance	02.04.23
 ESG	Viking Cove Advisor Alliance	02.05.23
 Great SECURE 2.0 Advice for Advisors: VCI Industry Leaders Summit	401kspecialist	02.06.23
 Employee Benefits Lifetime Income	American Bar Association	02.10.23
 How Will Florida's Fiduciary Ruling Affect Advisors? ERISA Experts Weigh In	NAPA	02.15.23
 Empower Coffee Tal(k) - Current Landscape of Lifetime Income in DC Plans	Columbia	02.16.23
 PTE 2020-02 Compliance Was So Last Year	Broadridge	02.16.23
 DOL's ESG Rule Under File in Courts, Congress	Ignites, a Financial Times Service	02.22.23
 Empower Coffee Tal(k) - Current Landscape of Lifetime Income in DC Plans	Columbia	02.22.23

 Webinar |  Podcast |  Conference |  Article |  Video Clip |  Quote

# Recent Speaking Events Featuring Bonnie Treichel

Title/Topic	Conference/Publication	Date
 SECURE 2.0 Brings 401(k) Plans to More Employees	Ignites, a Financial Times Service	02.22.23
 SECURE 2.0 Webinar	Precept Advisory Group (Hosted by Columbia)	02.22.23
 The Arbitrability of ERISA Claims	401KSpecialist	03.04.23
 Lifetime income, 401(k) plans and the road ahead	Columbia	03.07.23
 Case Studies in Retirement Income: The Plan Sponsor Perspective	Broadridge	03.14.23
 Retirement Income Products Should Reflect Retirees' Desire for Stability, Survey Shows	PlanSponsor	03.20.23
 Cybersecurity: Validate and Communicate Alignment with the DOL's Best Practices	Broadridge	03.29.23
 ESG(k) Bootcamp sponsored by Natixis Investment Managers	NAPA 401(k) Summit	04.02.23
 Income Outcomes: Protected Retirement Solutions... That Actually Work!	NAPA 401(k) Summit	04.03.23
 SECURE Act Update	Columbia	04.06.23
 Breakout Session: The Latest on In-plan Retirement Income Solutions	Investment News Retirement Income Summit	04.17.23
 Lifetime Income	Transamerica Exclusive Advisor Summit   American Century	04.18.23
 In-Plan Retirement Income Solutions	That Annuity Show	04.21.23
 Plan Retirement Income: A Case Study and the Need for Courage	Qualified Plan Fiduciary Summit	04.25.23
 Purposeful Communication: Women and Finance	Qualified Plan Fiduciary Summit	04.25.23
 Retirement Advisory Council Practice Leader Secure 2.0 Peer to Peer	Viking Cove Institute	04.27.23

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  Podcast | 
  Conference | 
  Article | 
  Video Clip | 
  Quote