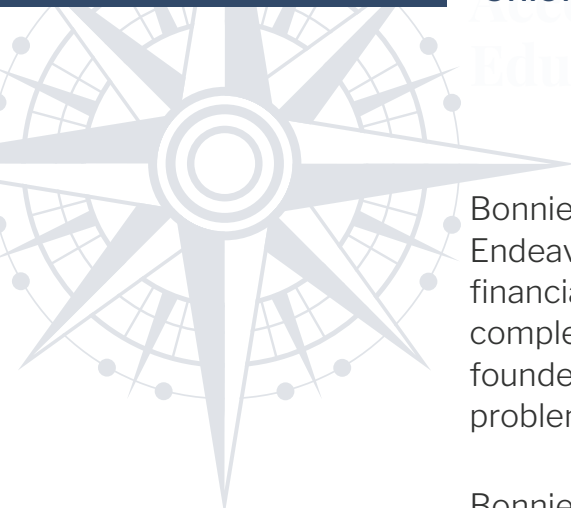




Bonnie Treichel, JD

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
 How Does Real Retirement Income Stress Testing Change the Client Experience?	Income Lab	05.02.23
 SECURE Act 2.0: Action Items for Plan Sponsors in 2023 and Beyond Confirmation	Columbia	05.04.23
 Employee Benefits Lifetime Income	2023 May Tax Meeting	05.05.23
 Staying Ahead of the Game: Best Practices Reflecting Lessons from Litigation	Nuveen Retirement Outcomes Leadership Council	05.08.23
 Understanding the Final Regulations for Investment Selection: ESG and Beyond	NAPA	05.09.23
 Staying Ahead of the Game: Best Practices Reflecting Lessons from Litigation	Retirement Plan Advisor Summit-SE 2023	05.11.23
 From Crisis to Opportunity: Emergency Savings and Student Loan Strategies for Retirement Advisors in SECURE 2.0	Retirement Plan Advisor Summit-SE 2023	05.12.23
 Fiduciary Workshop Best Practices	CunaMutualGroup	05.17.23
 New Law Firm Offers Flat-Fee Service for Advisors in Retirement Space	ThinkAdvisor	05.17.23
 ERISA Expert Bonnie Treichel Launches New Firm, Endeavor Law	NAPA	05.18.23
 Retirement Industry People Moves	PlanAdviser	05.19.23
 Treichel and Cooper Team Up Again	PlanSponsor	05.19.23
 Broadridge Fi360: Cybersecurity for Advisors	401kwire.com	05.22.23
 We Want your Data...or Do We? Cybersecurity for Advisors + Consultants	Broadridge Fi360 Solutions	05.22.23
 Business over Breakfast (Tulsa)	Columbia	05.23.23
 Business Over Breakfast (OKC)	Columbia	05.24.23

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

Recent Speaking Events Featuring Bonnie Treichel

Title/Topic	Conference/Publication	Date
 Rollover Regulations In Your Rearview Mirror?	NAPA	05.31.23
 40 Under 40	InvestmentNews	06.05.23
 Nuveen Leaders in Lifetime Income—Taking Action: A Roadmap to Lifetime Income	TIAA/Nuveen	06.07.23
 LinkedIn Live with RISA	RISA	06.07.23
 Lifetime Income Webinar with First Harbor & Bonnie Treichel	Columbia	06.13.23
 Reimagining Retirement Series #5	Endeavor Retirement	06.20.23
 RAC: SECURE 2.0—Adoption and Implementation	Retirement Advisor Council	06.21.23
 Financial Planning Considerations for Advisors	Broadridge	07.13.23
 Will Small Cash Incentives Get Lower Income Workers to Save for Retirement?	The Street	07.13.23
 Fiduciary Training Guaranteed Income Plan Options	Duke Financial	07.18.23
 Your 401(K) Likely Includes Military Weapons Holdings	Investment News	07.19.23
 Fiduciary Webinar: Endeavor & TW/GP	GoalPath	08.10.23
 Pensionmark/Columbia Threadneedle Coffee Talk	Columbia	08.16.23

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  Quote