

Bonnie Treichel, JD

Founder and 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 U.S. 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. In 2023, Bonnie was named to InvestmentNews 40 Under 40 list.

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 also 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 a prominent figure in the media, appearing in renowned publications like The Wall Street Journal and leading retirement industry outlets such as NAPA Net Daily and 401(k) Specialist. She is frequently invited as a keynote speaker and panelist at major industry gatherings.



Sample Speaking 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 the PTE 2020-02 requirements as well as the evolving regulatory landscape from SECURE, SECURE 2.0 and much more

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 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 Today!



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Recent Speaking Events Featuring Bonnie Treichel

	Title/Topic	Conference/Publication	Date
	What to Expect While You're Expecting the Fiduciary Rule	NewsAnalysis	1.15.24
	In-plan Retirement Income	Columbia	1.26.24
	Litigation Landscape: Targeting TDFs, 'Meaningful' Markers, and Pre-Litigation Letter Campaigns	NAPA	1.29.24
	IBM Launches Retirement Benefit Account, Revolutionizing Employee Pension Plans	The Street	1.30.24
	Litigation, Capitol Hill, and Everything Else	VCI 2024 Industry Leaders Summit Invitation	2.2.24
	Low Fees, High Value: How to Strike the Right Recordkeeping Balance	Napa Net	2.3.24
	Key Action Points for Advisors to Consider Ahead of Final Fiduciary Rule	401k Specialist	2.5.24
	Avoiding the L Word: Safeguarding and Getting Ahead of Your Plan's Potential Litigation Risks and Shoring Up Your Governance Practices	Retirement Plan Advisor Summit Southeast 2024	2.7.24
	Litigation Update	Endeavor Retirement	2.21.24
	Fees, Funds, Fiduciaries: Why They Are Still Important	CUNA	2.22.24
	DOL Retirement Security Rule Now Under OMB Review, But Changes Unknown for Now	401KSpecialist	3.11.24



Webinar



Conference



Podcast



Article



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Quote

	Title/Topic	Conference/Publication	Date
“	Fast Track: DOL Sends Final Fiduciary Rule to White House	Ignites	3.12.24
“	New Study Highlights How Women Can Control Their Financial Well-Being	Forbes	3.18.24
📺	Reimagining Retirement Series #7	Endeavor Retirement	3.20.24
📺	Women's History Month	Vestwell	3.26.24
📄	Alliance Bernstein 401(k) Lawsuit Booted	Investment News	3.27.24
📄	A Call to Action on Retirement Income (It's Time to Solve the Problem)	Endeavor Retirement	3.28.24
👤	NAPA ESG(k) Bootcamp	NAPA Conference	4.7.24
👤	NAPA 401(k) Summit- Impacted: Elevating Strategic Conversations Session	NAPA Conference	4.8.24
👤	NAPA Retirement Income Bootcamp	NAPA Conference	4.9.24
📄	Rebutting 7 Retirement Income Concerns	Plan Adviser	4.18.24
👤	Common Plan Errors Litigation	Columbia 401k Queso	4.24.24
📺	Fiduciary Rule	Endeavor Retirement	4.25.24



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Quote

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“	401(k) Specialist	Breaking Down the Basics: DOL Fiduciary Rule	4.29.24
	WIPN Boston: "Unlocking Your Potential"	WIPN Blackrock (Boston)	5.1.24
“	Unsolicited and Implied Rollovers Under the New Fiduciary Rule	PlanAdviser	5.1.24
	Employee Benefits Lifetime Income Subcommittee	ABA Tax Meeting - Washington, D.C.	5.3.24
“	Fiduciary Rule Lawsuit Leans on Past Court Strike-Down	PlanSponsor	5.3.24
“	Fiduciary Rule Lawsuit Leans on Prior Court Rebuttal	PlanAdviser	5.3.24
	A Conversation with Endeavor Retirement Founder Bonnie Treichel	ThinkAdvisor	5.6.24
	Fulfilling Your Fiduciary Obligations Common Plan Errors: Because Retirement Plans are Complicated	Human Investing	5.7.24
	Convergence of Wealth and Retirement	Wealth Management EDGE	5.15.24
	Cybersecurity Panel	Broadridge 360 Advisor Summit	5.20.24
	Retirement Income Panel	Broadridge 360 Advisor Summit	5.20.24



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Conference



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	Understanding Retirement Income Solutions: A Primer on Insurance Options in DC Plans	AllianceBernstein	5.21.24
	Evaluation of In-Plan Income Solutions	Columbia I RBC	5.23.24
	Common Plan Errors: Because Retirement Plans are Complicated	Columbia I SRP Retire	5.30.24
	Battle Lines Drawn Over DOL's Fiduciary Rule	InvestmentNews	6.4.24
	How Listening to Clients Can Transform Your Business	FinServ	6.6.24
	Crypto in 401(k) Plans: Considerations for Plan Sponsors	Thomson Reuters	6.6.24
	Biden's 401(k) Reforms: Employers Fume Over New Retirement Responsibilities	Msn.com	6.9.24
	Fiduciary vs. Non-Fiduciary Adviser: Understanding the Difference for Your Retirement	TheStreet	6.19.24

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