

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. She is on the board for the FinServ Foundation and active in the American Retirement 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 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:

- **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 and Alternative Investments:** Get beyond the hype and learn how crypto and alternative investments 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 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!



816.284.2180



info@endeavor-retirement.org








endeavor-retirement.com



linkedin.com/in/bonnietreichel



Recent Speaking Events Featuring Bonnie Treichel

	Title/Topic	Conference/Publication	Date
	From Plan Education to Wealth Management	Plan Adviser	7.1.24
	FinServ Foundation Welcomes Two Distinguished Leaders to its Board of Directors	NewsDirect	7.10.24
	Retirement Income Solutions in QDIAs: What Are the Impediments?	NAPA	7.11.24
	Man Vs. Machine: Benefits of Investing in a CIT Instead of a Mutual Fund in 401(k)	The Street	7.23.24
	Reimagining Retirement: Participant Data in Your Practice	Endeavor Retirement	7.23.24
	ERISA Attorneys Outline Next Steps, Actions Item After DOL Fiduciary Rule Stays	401k Specialist	8.2.24
	Enhancing Collaboration: Partnering with Advisors to Grow Your Business.	Empower TPA Summit	8.7.24
	Lifetime Income	CPPC Annual Conference 2024	8.29.24
	Ethical Conversations about Fees	CPPC Annual Conference 2024	8.30.24
	Litigation Update	Endeavor Retirement	9.11.24
	Lessons Learned from Litigation	Be More than a Fiduciary	9.11.24



Webinar



Conference



Podcast



Article



Video Clip

Quote

	Title/Topic	Conference/Publication	Date
	Building a Brand by Being Yourself	WIPN	9.12.24
	Washington Update with Bonnie & Tom	2024 iJoin MasterClass	9.13.24
	ERISA Fiduciary Responsibilities for Today, Tomorrow and Beyond	Columbia SilverOak	9.18.24
	Power Plays and Pivots	WiPN 9th Annual Woman's Leadership Summit	9.26.24
	Guest on Live Nevin & Fred Podcast	Nevin & Fred	9.30.24
	Compliance for Retirement Plan Professionals	Strategic Retirement Partners 2024 Annual Conference	10.1.24
	Crypto Considerations for 401(k) Plan Sponsors	Reuters	10.1.24
	Workshop 7: Enhancing Collaboration: Partnering with Advisors to Serve Our Clients	ASPPA Annual	10.21.24
	Reimagining Retirement The Post Chevron Perspective	Endeavor Retirement	10.29.24
	ERISA Experts See Regulation Pullback as Key Theme of Trump Rule	Plan Adviser	11.6.24
	DOL Fiduciary Rule, ESG Considerations Likely DOA Under Second Trump Term	401k Specialist	11.7.24
	Retirement Income Stands out as a Rare Consensus Focus for Politicians	PlanSponsor	11.12.24



Webinar



Conference



Podcast









Article



Video Clip

Quote

	Title/Topic	Conference/Publication	Date
	Wealth Services: Balancing Opportunity With Conflict	Planadviser National Conference	11.11.24
	Fiduciary Duties for Non-ERISA Retirement Plans	Fiduciary Summit Event	11.12.24
	Endeavor Retirement Debuts Plan Policy, Litigation Resources	PlanSponsor	11.14.24
	Retirement Plan Cybersecurity: Keeping Your Participant Data Safe	Broadridge	11.21.24
	Intellicast: Fulfilling your Fiduciary Obligations	Columbia Intellicents	12.11.24
	Retirement Income Solutions: Lessons Learned from Retirement Income in 2024 and Beyond	Broadridge	12.12.24
	Lifetime Income w/ Bonnie Treichel: Frameworks, Collaboration, and Fiduciary Leadership	Tao of Chao Podcast	12.23.24
	Dealing with Problematic Clients: A Guide for Retirement Industry Service Providers	ASPPA PLAN CONSULTANT	Winter 2025
	Fiduciary Duties by John Faustino, AIFA®, PPC® of Fi360 regarding the latest regulations for retirement	Broadridge	1.15.25
	Advisor Training Series	Endeavor Retirement	1.16.25
	Ethical Conversation About Fees & Expenses	2025 Rocky Mountain Benefits Conference	1.23.25

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