

Bonnie Treichel, JD

Founder and Chief Solutions Officer



Bonnie Treichel is the Founder and Chief Solutions Officer of Endeavor Retirement. With past experience as a financial advisor and now as an ERISA attorney, consultant, and plan sponsor, Bonnie knows first-hand the complexities and challenges of the U.S. retirement market. She founded Endeavor Retirement and Endeavor Law to use her expertise 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, speaker, and author 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 bootcamps eligible for CE credit. She also provides training for both home office and for NextGen audiences.

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, Data and Privacy:** 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 retirement plan governance, so advisors and their plan sponsor clients are empowered to maximize savings for their participants to have 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
	FinServ Foundation	FSI One Voice Conference	1.27.25
	Is SECURE 3.0 on the Horizon?	PlanAdviser	2.3.25
	2025 Annual Legislative & Regulatory Update	Sacramento Western Pension & Benefits Council	2.11.25
	Frameworks for Adding Retirement Income to Your Plan	Broadridge	2.18.25
	A Dual Quest for Participant Assets	PlanAdviser	3.3.25
	Washington Update: A Practical Look at Litigation, Legislation and Regulation	Shepard Financial	3.5.25
	The Evolving World of DC Menus: What, How and Why in Your Investment Line-ups	TIAA	4.9.25
	The Ever-Evolving Landscape for Defined Contribution Plans	Charles Schwab & Co., Inc	4.9.25
	PSCA Retirement Income	NAPA Summit - Sageview Webinar	4.16.25
	The Facts of Lifetime Income: Unpacking the Case for More Spending Security in Retirement	Broadridge	4.17.25
	Understanding Your Fiduciary Responsibility	Natixis NAPA	4.21.25



Webinar



Conference



Podcast



Article



Video Clip

Quote

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	Evaluating Retirement Income Strategies for Defined Contribution Plans	Broadridge	Spring 2025
	2025 MasterClass	Human Investing	4.23.25
	“Want” Adds?: Lifetime Income Options – Why Everybody Wants it, But Nobody Takes It	NAPA 401(k) Summit	4.28.25
	NAPA 401(k) Managed Accounts Certificate Bootcamp	NAPA 401(k) Summit	4.28.25
	Why Everyone Wants, but Doesn't Take, Lifetime Income	NAPA-Net	4.29.25
	The True Value of Retirement Income: Comparing and Implementing	NAPA 401(k) Summit	4.30.25
	Retirement Income for 401(k) Plans Bootcamp	NAPA 401(k) Summit	4.30.25
	It's NAPA-demic: The Ultimate Retirement Plan Quiz Bowl	NAPA 401(k) Summit	4.30.25
	Retirement Income Options and Strategies	PSCA	5.1.25
	Retirement Income for Plan Sponsors Certificate Bootcamp	PSCA	5.2.25
	Increasing Collaboration for Retirement Plan Growth	2025 NIPA Annual Forum & Expo	5.7.25
	Employee Benefits Lifetime Income Subcommittee	2025 May Tax Meeting	5.9.25

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	Regulatory Update Panel	Broadridge Fi360 Client Advisory Board Meeting	5.15.25
	Back to the Basics: Helping Plan Sponsors Understand Their Fiduciary Duties	Natixis PSCA	5.20.25
	Mastering Brand Building – Turning Technical Expertise into Marketing Gold	WIPN Mastering Brand Building Lunch 'n Learn	5.22.25
	The Ever-Evolving Landscape for Defined Contribution Plans	MSWM Thrive Conference	6.9.25
	Retirement Income Strategies – Best Practices in 2025	Wealth Management Edge	6.10.25
	Mastering Brand Building – Turning Technical Expertise into Marketing Gold	WIPN Lunch & Learn w/ Bonnie Treichel	6.12.25
	NAPA Retirement Income Bootcamp Pacific Life	NAPA	6.12.25
	Changing World of Rules for Retirement Plans	KCMBA	6.17.25
	Train the Trainer Managed Accounts	NAPA	6.18.25
	Coming to a 401(k) near you: Private market assets	CNBC	7.13.25
	RetireTech Collaboration Fuels Growth, but are Contracts Required?	NAPA Net	7.24.25
	Top 3 Considerations that Come with Retirement Plan Customization	NAPA Net	7.29.25
	AI and Action Items for Retirement Plan Advisors	NAPA Net	7.29.25

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	Understanding private markets in defined contribution plans	Invesco	7.31.25
	The Evolving World of DC Menus: what, how, and why in your investment line-ups	TIAA TMRW Regional	8.4.25
	Alternative assets are headed for your 401(k) – here’s what investors need to know	CNBC	8.8.25
	NAPA (Empower) 401(k) Managed Accounts Session	NAPA	8.19.25
	In-plan Retirement Income: Revenue, Roles & Real-World Application	Broadridge Webinar Series	8.21.25
	CBIZ Women’s Event National Women’s Equality Day	CBIZ	8.26.25
	The Evolving World of DC Menus: what, how and why in your investment line-ups	CPPC Conference (Innovest/Columbia)	8.27.25
	What Goldman’s deal with T. Rowe Price means for private assets in your 401(k)	CNBC	9.8.25
	Policy, Regulation, and Litigation: The Changing DC Environment	2025 iJoin MasterClass Executive Forum	9.12.25
	Beyond the 401(k): The Future of Retirement	VEST: Vestwell’s Savings Summit	9.15.25
	Retirement Income for 401(k) Plans	Retirement Income for 401 (k) Plan (sponsored by Pacific Life)	9.16.25
	Litigation v. Regulation: How Should Plan Advisors Respond to the Shifting Landscapes?	Retirement Plan Advisor Summit West Conference	9.17.25
	Luncheon and Networking Reception - WIPN Members and Institutional Investor	WIPN	9.17.25

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	Rethinking Retirement: Innovations in Guaranteed Lifetime Income	NAPA Editorial Webcast with TIAA	9.22.25
	Understanding Your Fiduciary Responsibilities: Key Lessons and Best Practices for Plan Sponsors	Columbia Sponsored Webinar (RMR Wealth)	9.25.25
	Experts Suggest Additional Year-End Plan Sponsor Considerations	Plan Sponsor	10.28.25
	Navigating the New Landscape: Roth Contributions and Catch-Up Rules Post-SECURE	ASPPA Annual Conference	10.28.25
	Leveraging Retirement Plan Data to Collaborate and Win New Business	John Hancock Retirement	11.4.25
	Key trends and implications for advisors in the ever-evolving defined contribution plan market	IMPACT 2025 Charles Schwab	11.6.25
	Understanding Your Fiduciary Responsibility	Natixis Webinar	11.10.25
	Pillars of Excellence: Five Rules to Deliver Excellence Every Single Time	Strategic Retirement Partners 2025 Annual Conference	11.18.25
	Regulatory Momentum for Retirement Income Solutions and What's Coming Next	Broadridge Webinar Series	12.16.25
	Portfolio Innovation in Practice: Alternatives and Investment Menu Design Evolution	TIAA TMRW Consultant National Event	1.13.26
	Key trends and implications for advisors in the ever-evolving defined contribution plan market	TIAA TMRW Consultant National Event	1.14.26
	Plan Committee Engagement with Bonnie Triechel	Raymond James	1.20.26
	Retirement/Guaranteed Income Solution	Columbia - Bank of Oklahoma	1.22.26

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	Advisor Confidential Recap Manulife John Hancock BlackRock	UBS/Columbia	1.22.26
	Don't Treat Retirement Like One-Size-Fits-All with Bonnie Treichel, Endeavor Law	Don't Do That	1.30.26
	Naifa DC	Basis, Basis, Basis – The OBBBA Tax Act	2.3.26
	Bonnie's Journey in Retirement Plans	The Gap	2.3.26
	A Washington Update (and How to Use It)	John Hancock Retirement	2.4.26
	Demystifying In-Plan Retirement Income Options	Innovest Conference (Columbia)	2.5.26
	Your Retirement Isn't Set in Stone, But It Can Be a Work of Art	Kiplinger	2.7.26
	Retirement Industry Trends	Workplace Benefits Annual Meeting (Bank of America)	2.11.26
	The Battle For Rollovers Intensifies As Wealth And Retirement Converge	Financial Advisor	2.12.26
	Executive Q&A: Curtailing ERISA Litigation and Understanding Best Practices with Bonnie Treichel	401(k) Specialist	2.25.26
	Your Retirement Sketchbook	Jamie Hopkins and Bonnie Treichel	3.31.26

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