

Bonnie Treichel, JD

Founder and Chief Solutions Officer



As a thought leader on retirement plan governance issues, Bonnie is the co-author of *Your Retirement Sketchbook* and has been quoted in publications such as *The New York Times*, *The Wall Street Journal*, *Kiplinger*, *InvestmentNews*, *401(k) Specialist*, *Ignites*, *PlanAdviser*, *NAPA Net Daily*, and *Journal of Pension Benefits*. She is an active member of the American Retirement Association and has served in various leadership roles as well as the American Bar Association's Tax Division where she was on the Lifetime Income Committee. She was awarded *InvestmentNews* 40 Under 40 in 2023, the ABA's On the Rise - Top 40 Young Lawyers Award in 2022, and NAPA Top Influencers for 2024 and 2025. She is also a member of the Women in Pensions Network, the State Bar of California, the State Bar of Kansas, current advisory board member of RISA, LLC and board member for the FinServ Foundation.

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
	Q1 2026 Advisor Coaching and Practice Management	Endeavor Retirement	1.6.26
	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 Treichel	Raymond James	1.20.26
	Retirement/Guaranteed Income Solution	Columbia - Bank of Oklahoma	1.22.26
	Advisor Confidential Recap Manulife John Hancock BlackRock	Raymond James	1.22.26
	Washington Insider – Insights from the Capitol	UBS/Columbia	1.30.26
	Don't Treat Retirement Like One-Size-Fits-All with Bonnie Treichel, Endeavor Law	Don't Do That	1.30.26
	Basis, Basis, Basis – The OBBBA Tax Act	Naifa DC	2.3.26
	Q4 2025 Litigation Update	Endeavor Retirement	2.3.26
	Bonnie's Journey in Retirement Plans	The Gap	2.3.26



Webinar



Conference



Podcast



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Quote

	Title/Topic	Conference/Publication	Date
	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
	The Great Convergence: Bridging Wealth & Retirement	InvestorCOM	2.12.26
	Executive Q&A: Curtailing ERISA Litigation and Understanding Best Practices with Bonnie Treichel	401(k) Specialist	2.25.26
	Legislative & Regulatory Update	WP&BC Sacramento	2.25.26
	The Legal Eagle Birds Eye View	VCI Industry Leaders Summit	3.5.26
	Your Retirement Sketchbook – Designing the Life You Imagine	VCI Industry Leaders Summit	3.5.26
	Jamie Hopkins and Bonnie Treichel: Why You Can't Set and Forget a Retirement Plan	Morningstar, The Long View Podcast	3.11.26
	Your Retirement Sketchbook: Seeing the Life Behind the Numbers	Future Proof Citywide 2026	3.11.26
	BlueSteps Webinar: Your Retirement Sketchbook	BlueSteps	3.11.26

	Title/Topic	Conference/Publication	Date
“	A picture of a retirement plan is worth a thousand words — and could help you save more	MarketWatch	3.17.26
“	'Your Retirement Sketchbook' authors offer planning, saving lessons	InvestmentNews	3.19.26
	Feature Presentation – Washington Insider: Retirement Plan Policy Insights from the Capitol	Ameritas RP Forum Nashville, TN	3.23.26
	Feature Presentation – Washington Insider: Retirement Plan Policy Insights from the Capitol	Ameritas RP Forum Nashville, TN	3.23.26
“	Visualizing Retirement With a New Sketchbook	401(k) Specialist	3.27.26
	Like Baking a Cake, Plan Your Retirement With Core Ingredients, But Personalize the Frosting	Kiplinger	3.30.26
“	Industry Leaders React to DOL Proposal Expanding Alternatives to 401(k)s	401(k) Specialist	3.30.26
“	Ten Retirement Tips for Clients—in Sketches	Wealth Management	3.30.26
“	401(k) Plans Could Add Riskier Investments Under a New Rule	The New York Times	3.30.26
“	New DOL Rule Opens 'Safe Harbors' for Alts Access in 401(k)s	Wealth Management	3.30.26
	Boundaries, Time, and Saying No	ReStructured Podcast	3.30.26
	Keep your emotions out of your retirement investing. Here's why.	Yahoo! Finance	3.31.26

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	Why your retirement plan needs more than numbers	Yahoo! Finance	3.31.26
	Why retirement planning requires visualization, not just calculation	InvestmentNews	3.31.26
	Your Retirement Sketchbook	Jamie Hopkins and Bonnie Treichel	3.31.26
	Q2 2026: Advisor Coaching and Practice Management	Endeavor Retirement	4.7.26
	M&A 101: Navigating 401(k) Compliance Risks and Organizational Transitions	Human Investing Portland	4.8.26
	Washington Update: A Practical Look at Litigation, Legislation, and Regulation	Human Investing Portland	4.8.26
	Engaging Employees in 2026: ALICE & Impactful Tools to Support Employee Wellbeing	Human Investing Portland	4.8.26
	Why Retirement Plans Weren't Built for Retirement — And Why That's Finally Changing	Retirement Income Consortium	4.16.26
	What Advisors Can Learn From Bonnie Treichel's Retirement Sketchbook Approach	Advisorpedia	4.16.26
	Financing Retirement: Saving and Then Some	ASPPA	4.16.26
	Retirement Rewirement: Why Most People Forget Why They Retired & How to Fix It w/ Bonnie Treichel	Wealth on the Move	4.16.26
	How and Why Managed Accounts Matter – What Advisors Need to Know	NAPA-Net	4.19.26

	Title/Topic	Conference/Publication	Date
	Private and Digital Assets Bootcamp	NAPA Summit	4.19.26
	Managed Accounts Bootcamp	NAPA Summit	4.21.26
	The Psychology of Retirement	Invest In Women Conference	4.23.26
	Why Clients With More Than 'Enough' Still Struggle In Retirement	Financial Advisor Magazine	4.28.26
	Q1 2026 Litigation Webinar	Endeavor Retirement	5.5.26
	PSCA's Retirement Income Bootcamp	PSCA National Conference	5.6.26
	The Retirement Sketchbook: Using Visual Planning to Create Better Client Outcomes	WP&BC Spring Conference	5.20.26
	Three Blind Spots in Modern Retirement Advice	Trust & Estates	5.21.26
	Your Retirement Sketchbook — Designing the Life You Imagine	Women in Finance Forum	5.27.26
	Conducting an Effective Recordkeeper Search	FidelityU	6.4.26
	Psychology of Retirement Webcast Series	Financial Advisor Magazine	6.24.26
	Senior Leaders "Lessons Learned" Panel	DCIIA Kohler, WI	6.30.26
	Advisor Coaching and Practice Management Workshop: Q3 2026	Endeavor Retirement	7.7.26
	The SEC Is Watching Your AI Use — Is Your Firm Ready?	Rethinking65	7.17.26

	Title/Topic	Conference/Publication	Date
	Forget Complex Spreadsheets. Financial Planners Should Try Sketching With Clients.	Barron's	8.3.26
	ERISA litigation surge puts plan sponsors on defense, brokers on alert	Insurance Business	8.7.26
	Recommend Investments to 401(k) Plans? Big Changes Could Be Coming	The Daily Upside	8.11.26



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