

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Brady J. Fuller

### **Item 1 – Cover Page**

#### **Brady J. Fuller**

B.O.S.S. Retirement Advisors, LLC

Located at:

2225 Washington Blvd., Suite 150

Ogden, UT 84401

801-990-5055

Home Office:

3400 N Ashton Blvd. Suite 190

Lehi, UT 84043

801-990-5055

[www.bossretirement.com](http://www.bossretirement.com)

Date of Supplement: February 26, 2024

**This brochure supplement provides information about Brady J. Fuller that supplements the B.O.S.S. Retirement Advisors, LLC (“B.O.S.S. Retirement Advisors”) disclosure brochure. You should have received a copy of that brochure. Please contact Curtis Packer, the firm’s Chief Compliance Officer, at 801-990-5055 if you did not receive B.O.S.S. Retirement Advisors’ brochure or if you have any questions about the contents of this supplement.**

**Additional information about Brady J. Fuller is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

### **Item 2 – Educational Background and Business Experience**

#### **Brady J. Fuller**

08/06/1983

CRD# 4994368

#### ***Post-Secondary Educational Background***

University of Utah, Bachelor of Science Degree – Finance, 2009

#### ***Business Background***

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 03/2019 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 03/2019 to Present

Fuller Financial Services, Owner, 03/2018 to 03/2019

Cetera Advisor Networks, Registered Representative / Investment Advisor Representative, 06/2016 to 03/2019

Lee Miles LLC, Investment Advisor Representative, 06/2014 to 06/2016

Lee Miles LLC, Insurance Agent, 12/2013 to 06/2016

J.P. Morgan Securities LLC, Financial Advisor, 10/2012 to 12/2013

Chase Investment Services Corp., Financial Advisor, 04/2011 to 10/2012

Sammons Securities Company LLC, Registered Representative, 02/2010 to 04/2011

Lincoln Financial Advisors, Registered Representative, 11/2008 to 01/2010

Sammons Securities Company LLC, Registered Representative, 08/2006 to 11/2008

Practice Management Inc., Director of Marketing, 08/2005 to 11/2008

### ***Certified Financial Planner***

Brady J. Fuller earned the Certified Financial Planner™ (CFP®) professional designation in 2013. The CFP (Certified Financial Planner) is a professional certification granted by the Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP mark, an individual must attain a bachelor’s degree from a US college or university and complete a college level course of study covering financial planning topics including insurance planning, financial management, investment planning, tax planning, retirement planning, and estate planning. Currently, the individual must also pass a comprehensive 6-hour exam, complete at least 6000 hours of professional financial planning experience (or 4000 hours of apprenticeship experience), and agree to be bound by the CFP Board’s Code of Ethics and Standards of Conduct. In addition, to maintain the right to continue to use the mark, an individual is required to complete continuing education coursework and continue to agree to be bound by the Code of Ethics and Standards of Conduct.

### **Item 3 – Disciplinary Information**

Brady J. Fuller has no legal or disciplinary events to report.

### **Item 4 – Other Business Activities**

Brady J. Fuller is a licensed insurance agent and may recommend transactions in insurance or annuity products for clients through various insurance companies. Clients are under no obligation to engage in any insurance transactions recommended by Mr. Fuller. Mr. Fuller may earn commissions, fees and/or incentive awards for these activities.

Brady J. Fuller has no other outside business activities to report.

### **Item 5 – Additional Compensation**

Brady J. Fuller does not receive any economic benefits, sales awards, or other compensation from product sponsors in connection with providing advisory services to clients.

However, the firm’s representatives may from time to time receive additional compensation or other economic benefits such as sales awards, bonuses, or non-cash compensation from AEWM and other third parties related to providing investment advisory products or services.

The availability of these benefits is not based on the firm or the representative giving particular investment advice, such as buying particular securities for a client.

### **Item 6 – Supervision**

Tyson Thacker is the firm’s Chief Executive Officer and is responsible for supervision of all employees. Curtis Packer is the firm’s Chief Compliance Officer and is responsible for overseeing and enforcing the firm’s regulatory compliance programs. Both Mr. Thacker and Mr. Packer can be contacted at 801-990-5055.