

FORM ADV PART 2B BROCHURE SUPPLEMENT

Cole Lyon

Item 1 – Cover Page

Cole Lyon

B.O.S.S. Retirement Advisors, LLC
Located at:
10355 S. Jordan Gateway, Suite 100
South Jordan, UT 84095

Home Office:
3400 N Ashton Blvd, Suite 190
Lehi, Utah 84043
801-990-5055
www.bossretirement.com

Date of Supplement: February 26, 2024

This brochure supplement provides information about Cole Lyon 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 Cole Lyon is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Cole Lyon

12/27/1997
CRD #7337450

Post Secondary Educational Background:

Sierra Nevada University, B.S.B.A. – Triple Major in Finance and Economics, Marketing, and Ski Business Resort Management, 2020

Business Background:

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 08/2021 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 08/21 to Present
Incline Investment Advisors, LLC, Investment Advisor Representative, 03/2021 to 08/2021
Incline Investment Management, Investor Relations, 09/2020 to 08/2021
Hyatt Hotels Corporations, Assistant Server, 06/2018 to 04/2021
Sierra Nevada University, Ski Coach, 09/2018 to 04/2020
Camp Richardson Resort, Food Runner, 06/2017 to 09/2017, 06/2016 to 09/2016

Item 3 – Disciplinary Information

Cole Lyon has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Mr. Lyon has no other outside business activities to report.

Item 5 – Additional Compensation

Cole Lyon 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.