

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Kelly L. Holtman

### **Item 1 – Cover Page**

#### **Kelly L. Holtman**

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 29, 2024

**This brochure supplement provides information about Kelly L. Holtman 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 Kelly L. Holtman is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

#### **Kelly L. Holtman**

03/17/1968

CRD# 5098214

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

Westminster College of Salt Lake City, Bachelor of Business, 1991

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 02/2024 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 02/2024 to Present

Raymond James Financial Services, Inc., Financial Advisor, 07/2020 to 02/2024

Wells Fargo Advisors, Registered Representative, 01/2020 to 07/2020

Soltis Investment Advisors, LLC, Advisor, 05/2019 to 12/2019

Triad Advisors, Financial Advisor, 12/2017 to 05/2019

LPL Financial LLC, Operations Manager, 02/2011 to 12/2017

Hightower Securities, Registered Associate, 03/2010 to 02/2011

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

Kelly L. Holtman has no legal or disciplinary events to report.

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

Kelly L. Holtman 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 Ms. Holtman. Ms. Holtman may earn commissions, fees and/or incentive awards for these activities.

Kelly L. Holtman has no other outside business activities to report.

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

Kelly L. Holtman 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.