

FORM ADV PART 2B BROCHURE SUPPLEMENT

Zachary B. Mortensen

Item 1 – Cover Page

Zachary B. Mortensen

B.O.S.S. Retirement Advisors, LLC
Located at:
180 N. University Ave. Suite 150
Provo, Utah 84601
801-990-5055

Home Office:
3400 N Ashton Blvd. Suite 190
Lehi, UT 84043
801-990-5055

www.bossretirement.com

Date of Supplement: February 26, 2024

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

Item 2 – Educational Background and Business Experience

Zachary B. Mortensen

9/27/1994
CRD# 7072441

Post-Secondary Educational Background

Brigham Young University, Bachelor of Science in Finance, 08/2015 – 12/2018

Business Background

B.O.S.S. Retirement Advisors, Servicing Advisor, 05/2016 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 05/2016 to Present
BYU Football, Football Team Manager, 09/2015 to 05/2016
Church of Jesus Christ of Latter Day Saints, Missionary, 07/2013 to 07/2015

Item 3 – Disciplinary Information

Zachary B. Mortensen has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Zachary B. Mortensen 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. Mortensen. Mr. Mortensen may earn commissions, fees and/or incentive awards for these activities.

Zachary B. Mortensen has no other business activities to report.

Item 5 – Additional Compensation

Zachary B. Mortensen 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.