

**FORM ADV PART 2B BROCHURE SUPPLEMENT**

**Garrett Wozniak**

**Item 1 – Cover Page**

**Garrett Wozniak**

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: June 18, 2024

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

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

**Garrett Wozniak**

03/08/1991  
CRD #7086248

***Post Secondary Educational Background:***

Brigham Young University Idaho, Bachelor of Science Degree – Exercise Physiology, 2015  
University of Utah, Attended 2016 – 2018

***Business Background:***

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 06/2024 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 04/2024 to Present  
Merrill Lynch, Merrill Financial Solutions Advisor, 10/2022 to 06/2024  
Capital Wealth Advisors, Director of Operations & Associate Advisor, 11/2020 to 10/2022  
Fidelity Investments, Investment Solutions Representative, 03/2019 to 11/2020

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

Garrett Wozniak has no legal or disciplinary events to report.

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

Garrett Wozniak 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. Wozniak. Mr. Wozniak may earn commissions, fees and/or incentive awards for these activities.

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

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

Garrett Wozniak 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.