

FORM ADV PART 2B BROCHURE SUPPLEMENT

Alicia Carinalli

Item 1 – Cover Page

Alicia Carinalli

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

Located at:

2501 E State Ave.

Meridian, ID 83646

801-990-5055

Home Office:

3400 N Ashton Blvd. Suite 190

Lehi, UT 84043

801-990-5055

www.bossretirement.com

Date of Supplement: September 05, 2024

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

Item 2 – Educational Background and Business Experience

Alicia Carinalli

05/02/1981

CRD# 4711571

Post-Secondary Educational Background

Cal Poly, SLO, Bachelor’s Degree – Business Administration, 2003

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

Mainspring Wealth Advisors, Registered Associate, DBA/ Support Company, 06/2022 to 01/2024

Raymond James Financial Services Advisors, Inc., Investment Advisor Representative, 06/2022 to 01/2024

Raymond James Financial Services, Inc., Registered Representative, 06/2022 to 01/2024

Raymond James & Associates, Boise, ID, Registered Representative, 01/2022 to 06/2022

Raymond James & Associates, Meridian, ID, Registered Representative, 09/2021 to 01/2022

Raymond James & Associates, Santa Rosa, CA, Registered Associate, 05/2018 to 09/2021

Wells Fargo Clearing Services, LLC, Registered Representative, 11/2016 to 05/2018

Wells Fargo Advisors, LLC, Registered Representative, 05/2009 to 11/2016

Wachovia Securities, LLC, Registered Account Administrator, 03/2007 to 05/2009

Legacy Advisory Services, Inc., Home Office Employee Trading Specialist, 04/2006 to 03/2007

Legacy Financial Services, Inc., Home Office Employee Trading Specialist (Registered Representative), 04/2006 to 03/2007

Certified Financial Planner

Alicia Carinalli earned the Certified Financial Planner TM (CFP®) professional designation in 2023. 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

Alicia Carinalli has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Alicia Carinalli 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. Carinalli. Ms. Carinalli may earn commissions, fees and/or incentive awards for these activities.

Alicia Carinalli has no other outside business activities to report.

Item 5 – Additional Compensation

Alicia Carinalli may, from time to time, receive additional compensation and other non-cash or economic benefits from B.O.S.S. Retirement Solutions & Advisors, Advisors Excel, LLC (and/or affiliated companies), and other third parties related to providing investment advisory or insurance products and services. Such additional compensation generally consists of marketing support, cash bonus payments, reward trips, and/or other sales awards and prizes. These benefits are not the results of achieving sales quotas. We address these potential conflicts of interest by disclosing them through the ADV Part 2B brochure, other B.O.S.S. disclosures, following procedures, and the firm's fiduciary obligation to each 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.