

FORM ADV PART 2B BROCHURE SUPPLEMENT

Drake Puzey

Item 1 – Cover Page

Drake Puzey

B.O.S.S. Retirement Advisors, LLC
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 Drake Puzey 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 Drake Puzey is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Drake Puzey

06/27/1996
CRD# 7337081

Post-Secondary Educational Background

Utah Valley University, Bachelor’s Degree in Personal Financial Planning, 2021
Utah Valley University, Associates in Business Management, 2021

Business Background

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2021 to Present
B.O.S.S. Retirement Solutions, Servicing Advisor, 07/2021 to Present
Equitable Advisors, Associate Planner, 01/2021 – 07/2021
EnerbankUSA, Quality Assurance Specialist, 04/2019 – 01/2021
EnerbankUSA, Lender, 06/2017 – 04/2019
Utah Community Credit Union, Member Service Representative, 06/2016 – 06/2017

Item 3 – Disciplinary Information

Drake Puzey has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Drake Puzey is licensed as an 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. Puzey. Mr. Puzey may earn commissions, fees and/or incentive awards for these activities.

Drake Puzey has no other business activities to report.

Item 5 – Additional Compensation

Drake Puzey 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.