

FORM ADV PART 2B BROCHURE SUPPLEMENT

David Whitworth

Item 1 – Cover Page

David Whitworth

B.O.S.S. Retirement Advisors, LLC
3400 N Ashton Blvd, Suite 190
Lehi, Utah 84043
801-990-5055
www.bossretirement.com

Date of Supplement: September 05, 2024

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

Item 2 – Educational Background and Business Experience

David Whitworth

02/12/1972
CRD # 6693097

Post Secondary Educational Background:

Ricks College 1994, Rexburg, ID – Associate Degree in Biology
Brigham Young University 1996, Provo, UT – Bachelor of Science in Zoology, Minor in Business Administration

Business Background:

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2017 to Present
B.O.S.S. Retirement Solutions, Scheduling, 01/2013 to Present
Unemployed, 03/2012 – 12/2012
Enterprise Rent-A-Car, Area Manager, 01/1997 – 02/2012

Item 3 – Disciplinary Information

David Whitworth has no legal or disciplinary events to report.

Item 4 – Other Business Activities

David Whitworth 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. Whitworth. Mr. Whitworth may earn commissions, fees and/or incentive awards for these activities.

David Whitworth has no other outside business activities to report.

Item 5 – Additional Compensation

David Whitworth 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.