

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: September 05, 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.

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 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.