

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Spencer L. Felkins

### **Item 1 – Cover Page**

#### **Spencer L. Felkins**

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 Spencer L. Felkins 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 Spencer L. Felkins is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Spencer L. Felkins**

02/02/1996  
CRD# 7852114

#### ***Post-Secondary Educational Background***

Snow College, Associate of Science Degree, 2018

#### ***Business Background***

B.O.S.S. Retirement Advisors, Client Services, 10/2022 to Present  
B.O.S.S. Retirement Solutions, Client Services, 10/2022 to Present  
MP Lawncare and Lighting, Employee, 08/2019 to 10/2022  
Ardent Pest Control, Sales Representative, 05/2019 to 08/2019  
05/2017 to 05/2018, Topo Financial, Insurance Agent

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

Spencer L. Felkins has no legal or disciplinary events to report.

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

Spencer L. Felkins 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. Felkins. Mr. Felkins may earn commissions, fees and/or incentive awards for these activities.

Spencer L. Felkins has no other business activities to report.

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

Spencer L. Felkins 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.