

## FORM ADV PART 2B BROCHURE SUPPLEMENT

**Skyler C. Fredrickson**

### **Item 1 – Cover Page**

Skyler C. Fredrickson

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

Located at:

2825 E. Cottonwood Pkwy, Suite 380

Salt Lake City, UT 84121

801-990-5055

Home Office:

3400 N Ashton Blvd. Suite 190

Lehi, UT 84043

801-990-5055

[www.bossretirement.com](http://www.bossretirement.com)

Date of Supplement: September 05, 2024

**This brochure supplement provides information about Skyler C. Fredrickson 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 Skyler C. Fredrickson is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

#### **Skyler C. Fredrickson**

12/29/1981

CRD# 5699672

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

University of Louisville, 9/2000 - 5/2001

Utah State University, Bachelor’s Degree – Accounting, 9/2003 - 5/2008

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 10/2018 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 10/2018 to Present

Futurevest Insurance Solutions, Partner, 10/2013 to Present

inContact, Account Executive, 10/2017 to 10/2018

Futurevest Financial, LLC, Limited Partner/Owner, 01/2015 to 10/2018

Fredrickson Financial, LLC, Owner, 05/2013 to 10/2018

Futurevest Tax Solutions, Partner, 04/2011 to 10/2018

Skyler Fredrickson (self-employed), Insurance Agent & Tax Preparer, 09/2008 to 10/2017

Total Advisor Network, LLC, Investment Advisor Representative, 06/2016 to 10/2018

Planmember Securities Corporation, Registered Representative, 11/2014 to 02/2015

Financial Educational Systems, Agent, 04/2009 to 02/2015

Skyler Enterprises, LLC, President, 01/2006 to 05/2013

Berthel Fisher & Company Financial Services Inc., Registered Rep., 02/2010 to 01/2011  
Great American Advisors, Inc., Registered Representative, 07/2009 to 02/2010  
Advanced Financial Strategies, Representative, 09/2008 to 02/2009  
Split Marketing, Sales Representative, 02/2008 to 09/2008

### ***Certified Financial Planner***

Skyler C. Fredrickson earned the Certified Financial Planner TM (CFP®) professional designation in 2015. 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**

Skyler C. Fredrickson has no legal or disciplinary events to report.

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

Skyler C. Fredrickson 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. Fredrickson. Mr. Fredrickson may earn commissions, fees and/or incentive awards for these activities.

Skyler C. Fredrickson has no other outside business activities to report

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

Skyler C. Fredrickson 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.