

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Zachary B. Mortensen

### **Item 1 – Cover Page**

#### **Zachary B. Mortensen**

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

Located at:

3535 S. Market St., Suite 100

West Valley City, Utah 84119

801-990-5055

Home Office:

3400 N Ashton Blvd. Suite 190

Lehi, UT 84043

801-990-5055

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

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

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

#### **Zachary B. Mortensen**

9/27/1994

CRD# 7072441

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

Brigham Young University, Bachelor of Science in Finance, 08/2015 – 12/2018

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

B.O.S.S. Retirement Advisors, Servicing Advisor, 05/2016 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 05/2016 to Present

BYU Football, Football Team Manager, 09/2015 to 05/2016

Church of Jesus Christ of Latter Day Saints, Missionary, 07/2013 to 07/2015

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

Zachary B. Mortensen has no legal or disciplinary events to report.

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

Zachary B. Mortensen 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. Mortensen. Mr. Mortensen may earn commissions, fees and/or incentive awards for these activities.

Zachary B. Mortensen has no other business activities to report.

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

Zachary B. Mortensen 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.