

**FORM ADV PART 2B BROCHURE SUPPLEMENT**

**Craig B. Roth**

**Item 1 – Cover Page**

**Craig B. Roth**

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

Located at:

10210 NE Points Drive, Suite 110

Kirkland, WA 98033

425-822-8282

Home Office:

3400 N Ashton Blvd, Suite 190

Lehi, Utah 84043

801-990-5055

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

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

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

**Craig B. Roth**

02/15/1964

CRD #2162815

***Post Secondary Educational Background:***

SUNY at Stony Brook, Bachelor of Arts Degree, 1990

***Business Background:***

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 04/2024 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 04/2024 to Present

Wayfinding Financial, Financial Advisor, 03/2021 to 04/2024

Goldbloom Wealth Management, Associate Advisor, 05/2018 to 01/2021

Alaska USA, Financial Advisor, 05/2017 to 04/2018

Becker Retirement Group, Chief Investment Officer, 06/2015 to 05/2016

Merrill Lynch, Financial Solutions Advisor, 04/2013 to 02/2015

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

Craig B. Roth has no legal or disciplinary events to report.

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

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

Mr. Roth has no other outside business activities to report.

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

Craig B. Roth 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.