

## FORM ADV PART 2B BROCHURE SUPPLEMENT

**Rachael Scott**

### **Item 1 – Cover Page**

#### **Rachael Scott**

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: January 25, 2025

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

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

#### **Rachael Scott 07/07/1995**

CRD #7710235

#### ***Post Secondary Educational Background:***

Brigham Young University, Bachelor of Science Degree – Biology, 2017  
Montana State University, attended 2013-2016

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2024 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 09/2024 to Present  
J.P. Morgan Securities LLC, Licensed Relationship Banker, 03/2023 to 09/2024  
AI Tech, Employee/Contractor, 12/2023 to 01/2024  
JPMorgan Chase Bank, N.A., Associate Banker, 05/2022 to 03/2023

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

Rachael Scott has no legal or disciplinary events to report.

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

Rachael Scott 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 Ms. Scott. Ms. Scott may earn commissions, fees and/or incentive awards for these activities.

Rachael Scott has no other outside business activities to report.

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

Rachael Scott 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.