

FORM ADV PART 2B BROCHURE SUPPLEMENT

Bailey R. Pope

Item 1 – Cover Page

Bailey R. Pope

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: March 25, 2025

This brochure supplement provides information about Bailey R. Pope 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 Bailey R. Pope is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Bailey R. Pope

01/19/1997
CRD# 7769333

Post-Secondary Educational Background

University of Utah, Bachelors of Science: Finance, 2023

Business Background

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 03/2024 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 03/2024 to Present
Guardian Life Insurance Company, Agent, 06/2023 to 03/2024
Park Avenue Securities, Financial Representative, 09/2023 to 03/2024
VCA Willow Creek Pet Center, Veterinary Technician, 08/2015 to 07/2023

Item 3 – Disciplinary Information

Bailey R. Pope has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Bailey R. Pope 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. Pope. Mr. Pope may earn commissions, fees and/or incentive awards for these activities.

Bailey R. Pope has no other business activities to report.

Item 5 – Additional Compensation

Bailey R. Pope 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. 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.