FORM ADV PART 2B BROCHURE SUPPLEMENT

Brian Ward

Item 1 – Cover Page

Brian Ward
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: March 25, 2025

This brochure supplement provides information about Brian Ward 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 Brian Ward is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Brian Ward
03/07/1974
CRD #6058582

***Post Secondary Educational Background*:**

Utah Valley University, Bachelor of Arts Degree – Business Management, 1999

***Business Background*:**

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 02/2016 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 02/2016 to Present
Global Financial Private Capital, Investment Advisor Representative, 04/2012 to 02/2016
Capstone Wealth Group, Agent, 05/2011 to 02/2016
Republic Mortgage, Loan Officer, 10/2010 to 05/2011
Castle and Cooke, Loan Officer, 08/2008 to 10/2010
Taylor Mortgage, Loan Officer, 10/2004 to 08/2008
Advantage Lending, Loan Officer, 02/2002 to 10/2004

Item 3 – Disciplinary Information

Brian Ward has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Brian Ward 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. Ward. Mr. Ward may earn commissions, fees and/or incentive awards for these activities.

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

Item 5 – Additional Compensation

Brian Ward 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.