

FORM ADV PART 2B BROCHURE SUPPLEMENT

Christopher J. Dolan

Item 1 – Cover Page

Christopher J. Dolan

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 31, 2025

This brochure supplement provides information about Christopher J. Dolan 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 Christopher J. Dolan is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Christopher J. Dolan

10/27/1975
CRD# 5090040

Post-Secondary Educational Background

University of Washington, Master of Business Administration, 2008
Brigham Young University - Provo, Bachelor Degree in Spanish, 2002
Ricks College, AA Degree In Spanish, 1998

Business Background

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 03/2025 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 03/2025 to Present
EA Buck Financial, Advisor and Agent, 03/2023 to 03/2025
Madison Avenue Securities, Registered Representative, 03/2023 to 03/2025
Robert W Baird & Co., Financial Planner, 01/2016 to 03/2023
Charles Schwab & Co., Inc., VP – Financial Consultant, 07/2013 to 01/2016
Charles Schwab Bank, Dual Bank Employee, 07/2013 to 01/2016
Fidelity Investments, Financial Representative, 10/2006 to 06/2013
WM Financial Services, Inc., Licensed Personal Financial Representative, 02/2006 to 09/2006
Washington Mutual Bank, Licensed Personal Financial Representative, 11/2005 to 09/2006
The Walgreen Company, Manager, 05/2002 to 10/2005

Certified Financial Planner

Christopher J. Dolan earned the Certified Financial Planner TM (CFP®) professional designation in 2012. The CFP (Certified Financial Planner) is a professional certification granted by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). To attain the right to use the CFP mark, an individual must attain a bachelor's degree from a US college or university and complete a college level course of study covering financial planning topics including insurance planning, financial management, investment planning, tax planning, retirement planning, and estate planning. Currently, the individual must also pass a comprehensive 6-hour exam, complete at least 6000 hours of professional financial planning experience (or 4000 hours of apprenticeship experience), and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct. In addition, to maintain the right to continue to use the mark, an individual is required to complete continuing education coursework and continue to agree to be bound by the Code of Ethics and Standards of Conduct.

Item 3 – Disciplinary Information

Christopher J. Dolan has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Christopher J. Dolan is licensed as an 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. Dolan. Mr. Dolan may earn commissions, fees and/or incentive awards for these activities.

Christopher J. Dolan has no other business activities to report.

Item 5 – Additional Compensation

Christopher J. Dolan 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.