

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Cassidy A. O'Brien

### **Item 1 – Cover Page**

#### **Cassidy A. O'Brien**

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 Cassidy A. O'Brien 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 Cassidy A. O'Brien is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Cassidy A. O'Brien**

01/03/1995

CRD# 7204996

#### ***Post-Secondary Educational Background***

University of Utah, BS – Consumer Studies (Financial Planning emphasis), Minor in Business, 2017

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 11/2019 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 11/2019 to Present  
B.O.S.S. Retirement Advisors, Client Services, 02/2018 to Present  
Vista Treatment Center, Mental Health Worker, 11/2017 to 04/2018  
Universal Business Insurance, Account Manager, 05/2016 to 02/2018  
State Farm Insurance, Customer Services and Sales Representative, 04/2014 to 05/2016  
Nordstrom, Sales Associate, 11/2013 to 01/2014

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

Cassidy A. O'Brien has no legal or disciplinary events to report.

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

Cassidy A. O'Brien 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. O'Brien. Ms. O'Brien may earn commissions, fees and/or incentive awards for these activities.

Cassidy A. O'Brien has no other outside business activities to report.

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

Cassidy A. O'Brien 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.