

FORM ADV PART 2B BROCHURE SUPPLEMENT

Curtis G. Packer

Item 1 – Cover Page

Curtis G. Packer

B.O.S.S. Retirement Advisors, LLC
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 Curtis G. Packer 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 G. 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 Curtis G. Packer is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Curtis G. Packer

11/23/1972
CRD # 6788640

Post Secondary Educational Background:

University of Utah 1997 – Bachelor of Arts in Marketing, Minor in Japanese

Business Background:

B.O.S.S. Retirement Advisors, Chief Compliance Officer, 03/2020 to Present
B.O.S.S. Retirement Advisors, Client Services, 11/2016 to Present
B.O.S.S. Retirement Solutions, Insurance Agent, 11/2016 to Present
Associated Food Stores, Marketing Manager, 04/2009 to 10/2016
Unemployed, 11/2008 to 03/2009
Venafi, Inc., Marketing Manager, 04/2007 to 11/2008

Item 3 – Disciplinary Information

Curtis G. Packer has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Curtis G. Packer 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. Packer. Mr. Packer may earn commissions, fees and/or incentive awards for these activities.

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

Item 5 – Additional Compensation

Curtis G. Packer 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 G. 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.