

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Jonathan J. Albrethsen

### **Item 1 – Cover Page**

#### **Jonathan J. Albrethsen**

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 Jonathan J. Albrethsen 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 Jonathan J. Albrethsen is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Jonathan J. Albrethsen**

04/29/1990  
CRD# 7798864

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

Brigham Young University – Idaho, Bachelor of Science in Finance, 2023

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 02/2024 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 02/2025 to Present  
HA Wealth Advisors Inc., Investment Advisor Representative, 06/2023 to 12/2024  
HA Wealth Advisors, Unregistered Non-Advisor, 05/2023 to 12/2024  
Express Employment Professionals, Temp Agent, 09/2018 to 12/2018  
Security Metrics, PCI Compliance Consultant, 07/2016 to 08/2018  
Zodiac AeroSpace, Composite Technician, 10/2014 to 02/2016

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

Jonathan J. Albrethsen has no legal or disciplinary events to report.

**Item 4 – Other Business Activities**

Jonathan J. Albrethsen 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. Albrethsen. Mr. Albrethsen may earn commissions, fees and/or incentive awards for these activities.

Jonathan J. Albrethsen has no other business activities to report.

**Item 5 – Additional Compensation**

Jonathan J. Albrethsen 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.