

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Lisa K. George

### **Item 1 – Cover Page**

#### **Lisa K. George**

B.O.S.S. Retirement Advisors, LLC

Located at:

10210 NE Points Drive, Suite 110

Kirkland, WA 98033

425-822-8282

Home Office:

3400 N Ashton Blvd. Suite 190

Lehi, UT 84043

801-990-5055

[www.bossretirement.com](http://www.bossretirement.com)

Date of Supplement: March 25, 2025

**This brochure supplement provides information about Lisa K. George 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 Lisa K. George is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

#### **Lisa K. George**

09/17/1978

CRD # 7952358

#### ***Post Secondary Educational Background:***

Rocky Mountain College, Bachelor’s Degree, 2001

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2022 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 09/2022 to Present

B.O.S.S. Retirement Solutions, Office Administrator, 09/2022 to Present

Clothes for Kids, Program Director, 02/2022-08/2022

Clothes For Kids, Outreach Coordinator, 06/2017-01/2022

Clothes For Kids, Program Assistant, 08/2016-05/2017

Maplewood Presbyterian Church, Office Manager, 02/2011-07/2019

**Item 3 – Disciplinary Information**

Lisa K. George has no legal or disciplinary events to report.

**Item 4 – Other Business Activities**

Lisa K. George 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. George. Ms. George may earn commissions, fees and/or incentive awards for these activities.

Ms. George has no other outside business activities to report.

**Item 5 – Additional Compensation**

Lisa K. George 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.