

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Michael Zarlengo

### **Item 1 – Cover Page**

#### **Michael Zarlengo**

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, Utah 84043

801-990-5055

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

Date of Supplement: March 25, 2025

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

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

#### **Michael Zarlengo**

01/16/1970

CRD # 2434321

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

University of Denver, MS Finance, 2001

University of Colorado at Boulder, BA Communications, 1992

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 01/2025 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 01/2025 to Present

Bank of America, N.A, Financial Solutions Advisor-FC, 08/2024 to 01/2025

Merrill Lynch, Pierce, Fenner & Smith Inc, Financial Solutions Advisor-FC, 07/2024 to 01/2025

Valiant Litigation Finance, LLC, Vice President Sales, 06/2023 to 07/2024

Exemplar Capital, LLC, Registered Representative, 06/2023 to 07/2024

Charles Schwab & Co., Inc., Registered Representative/Investment Advisor, 12/2022 to 06/2023

TD Ameritrade, Senior Financial Consultant, 02/2021 to 12/2022  
TD Ameritrade, Senior FC, 12/2019 to 01/2021  
AXA Advisors, LLC, Registered Representative, 05/2019 to 12/2019  
Not Employed, 07/2018 to 05/2019  
Alps Fund Services, Internal Wholesaler, 09/2010 to 07/2018

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

Michael Zarlengo has no legal or disciplinary events to report.

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

Michael Zarlengo 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. Zarlengo. Mr. Zarlengo may earn commissions, fees and/or incentive awards for these activities.

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

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

Michael Zarlengo 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.