

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Shay N. Nelson

### **Item 1 – Cover Page**

#### **Shay N. Nelson**

B.O.S.S. Retirement Advisors, LLC  
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 Shay N. Nelson 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 Shay N. Nelson is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Shay N. Nelson**

01/09/1997

CRD# 7754466

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

Fort Lewis College, 2018, Bachelor’s Degree in Business Administration with a concentration in Tourism & Hospitality Management

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

B.O.S.S. Retirement Advisors, Office Administrator, 10/2021 to Present  
OrangeTheory, Sales Associate, 10/2020 to 07/2021  
Not employed, COVID Pandemic, 03/2020 to 09/2020  
Treehouse PR, Account Coordinator, 01/2020 to 02/2020  
The Rochester Hotel & Leland House, Shift Manager, 06/2017 to 12/2019

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

Shay N. Nelson has no legal or disciplinary events to report.

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

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

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

Shay N. Nelson 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.