

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Steve O'Flynn

### **Item 1 – Cover Page**

#### **Steve O'Flynn**

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 Steve O'Flynn 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 Steve O'Flynn is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Steve O'Flynn**

05/15/1976  
CRD# 6768704

#### **Business Background**

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 12/2023 to Present  
B.O.S.S. Retirement Solutions, Agent, 12/2023 to Present  
Fortem Financial Group, LLC, Wealth Advisor, 07/2023 to 10/2023  
Energos Investment Advisors, LLC, CEO, 04/2021 to 07/2023  
Morgan Stanley, Financial Advisor, 08/2019 to 03/2021  
Not Employed, 09/2018 to 08/2019  
Edward Jones, Financial Advisor, 04/2017 to 09/2018  
Not Employed, 04/2016 to 04/2017  
Nelsons Insurance Brokers, CFO, Managing Director, 07/2004 to 03/2016

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

Steve O'Flynn has no legal or disciplinary events to report.

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

Steve O'Flynn is licensed as an 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. O'Flynn. Mr. O'Flynn may earn commissions, fees and/or incentive awards for these activities.

Steve O'Flynn has no other business activities to report.

**Item 5 – Additional Compensation**

Steve O'Flynn 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.