

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Scott M. Swanson

### **Item 1 – Cover Page**

#### **Scott M. Swanson**

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

Located at:

2501 E. State Ave. Suite 120

Meridian, ID 83642

801-990-5055

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 Scott M. Swanson 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 Scott M. Swanson is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

#### **Scott M. Swanson**

08/22/1981

CRD# 7354956

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

Golf Academy of America, Associates Degree, 2009-2010

Seattle Pacific University, attended 2000-2002

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 01/2022 to Present

Northwestern Mutual Wealth Management Company, Representative, 12/2021 to 01/2022

Northwestern Mutual Investment Services LLC, Registered Representative, 11/2021 to 01/2022

Darby Heidemann, Associate Agent, 11/2021 to 01/2022

Financial Advocates Investment Management, Administrative Associate, 05/2021 to 10/2021

LPL Financial, LLC, Administrative Associate, 03/2021 to 10/2021

Integrity Wealth Advisors, Financial Advisor, 03/2021 to 10/2021

Not Employed, 01/2021 to 03/2021

Clean Image Services, Director of Business Development, 07/2020 to 12/2020

Not Employed, 01/2020 to 07/2020

Terril Lewis and Wilke, Insurance Sales, 10/2018 to 12/2019

Yakima Country Club, Head Golf Professional, 12/2010 to 09/2018

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

Scott M. Swanson has no legal or disciplinary events to report.

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

Scott M. Swanson has no other outside business activities to report.

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

Scott M. Swanson 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.