

FACTS	WHAT DOES B.O.S.S. RETIREMENT ADVISORS, LLC ("BOSS") DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the products or services you have with us. This information can include: • Social Security numbers and investment experience • Income and risk tolerance • Retirement assets and account transactions
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons BOSS chooses to share; and whether you can limit this sharing.

REASONS WE CAN SHARE YOUR PERSONAL INFORMATION	DOES BOSS SHARE?	CAN YOU LIMIT THIS SHARING?
For our everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus. We will also share your personal information at your discretion.	Yes	No
For our marketing purposes – to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes – information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes – information about your credit worthiness	No	We don't share
For nonaffiliates to market to you – for clients with accounts established with an BOSS independent financial professional	Yes	Yes

TO LIMIT OUR SHARING	Call (800) 637-1031 and ask for the BOSS Compliance Department or mail in the form provided below. Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
QUESTIONS?	Call (800) 637-1031

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MAIL-IN FORM		
Mark if you want to limit:		
☐ Do not share my personal information with nonaffiliates to market their products and services to me.		
Name:		Mail to: B.O.S.S Retirement Advisors, Attn: Compliance 2500 Executive Pkwy, Suite 500 Lehi, UT 84048
Address:		
City, State, Zip:		
Date of Birth:		

WHAT WE DO	
How does BOSS protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. The firm maintains safeguards to detect and respond to security breaches, and should a breach occur, notify affected individuals when required within 30 days of discovery.
How does BOSS collect my personal information?	We collect your personal information, for example, when you • Open an account or give us your contact information • Seek advice about your investments or tell us about your investment or retirement portfolio • Enter into an investment advisory contract • Direct us to buy or sell your securities We also collect your personal information from others, such as credit bureaus, affiliates, or other companies. We also use certain artificial intelligence (AI) tools for various business or client related purposes (such as recording and summarizing meetings), but the firm has strict policies related to the use of AI including the tools which may be used and the use and retention of results. The firm allows clients to opt out of meeting recordings.
Why can't I limit all sharing?	Federal law gives you the right to limit only: • Sharing for affiliates' everyday business purposes – information about your creditworthiness • Affiliates from using your information to market to you • Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

DEFINITIONS	
Affiliates	Companies related by common ownership or control. They can be financial and non-financial companies. • <i>Our affiliates include financial companies such as B.O.S.S. Retirement Solutions, LLC, AE Wealth Management, LLC, Advisors Excel, LLC.</i>
Non-affiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • <i>Nonaffiliates we may share information with include an independent representative's new investment advisory firm.</i>
Joint Marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • <i>BOSS doesn't jointly market.</i>

OTHER IMPORTANT INFORMATION	
• Call Monitoring and Recording. If you communicate with us by telephone, we may monitor or record the call.	

