

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Brandon P. Olson

### **Item 1 – Cover Page**

#### **Brandon P. Olson**

B.O.S.S. Retirement Advisors, LLC  
Located at:  
136 E Riverside Dr., Suite 101  
St. George, UT 84790

Home Office:  
2500 Executive Pkwy, Suite 500  
Lehi, UT 84048  
801-990-5055

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

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

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

#### **Brandon P. Olson**

09/22/1974  
CRD# 6479017

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

Snow College, 01/1996 to 05/1998 (Associate of Science Degree Conferred)  
Brigham Young University, 06/1998 to 05/2001 (Bachelor’s Degree Conferred)  
Brigham Young University, 06/1998 to 05/2001 (Master’s Degree of Science in Accounting, Emphasis: Tax Conferred)

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

B.O.S.S. Retirement Advisors, Retirement Advisor, 03/2015 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 03/2015 to Present  
Christensen Arms, Purchasing Manager, 01/2014 to 01/2015  
AZOMITE Mineral Products, Chief Financial Officer, 07/2011 to 11/2013  
Norbest, Inc. President, Chairman of the Board, 08/2008 to 04/2011  
Moroni Feed Company, Chief Financial Officer, 01/2006 to 04/2011  
Centex Homes, New Home Sales and Assistant Sales Manager, 09/2003 to 01/2006  
PricewaterhouseCoopers, LLP, Tax Associate, 06/2001 to 02/2003

#### ***Certified Public Accountant***

Brandon P. Olson is a Certified Public Accountant (CPA) with an emphasis in Tax. CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit

hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own

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

Brandon P. Olson has no legal or disciplinary events to report.

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

Brandon P. Olson 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. Olson. Mr. Olson may earn commissions, fees and/or incentive awards for these activities.

MTN MAN Realty, LLC, Principal Broker, 9/2009 to Present – Mr. Olson owns and operates several short-term rentals in Utah and Arizona.

Brandon P. Olson has no other outside business activities.

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

Brandon P. Olson 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.