

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Christopher J. Dolan

### **Item 1 – Cover Page**

#### **Christopher J. Dolan**

B.O.S.S. Retirement Advisors, LLC  
2500 Executive Pkwy, Suite 500  
Lehi, UT 84048  
801-990-5055

www.bossretirement.com

Date of Supplement: December 15, 2025

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

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

#### **Christopher J. Dolan**

10/27/1975  
CRD# 5090040

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

University of Washington, Master of Business Administration, 2008  
Brigham Young University - Provo, Bachelor Degree in Spanish, 2002  
Ricks College, AA Degree In Spanish, 1998

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 03/2025 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 03/2025 to Present  
EA Buck Financial, Advisor and Agent, 03/2023 to 03/2025  
Madison Avenue Securities, Registered Representative, 03/2023 to 03/2025  
Robert W Baird & Co., Financial Planner, 01/2016 to 03/2023  
Charles Schwab & Co., Inc., VP – Financial Consultant, 07/2013 to 01/2016  
Charles Schwab Bank, Dual Bank Employee, 07/2013 to 01/2016  
Fidelity Investments, Financial Representative, 10/2006 to 06/2013  
WM Financial Services, Inc., Licensed Personal Financial Representative, 02/2006 to 09/2006  
Washington Mutual Bank, Licensed Personal Financial Representative, 11/2005 to 09/2006  
The Walgreen Company, Manager, 05/2002 to 10/2005

### ***Certified Financial Planner***

Christopher J. Dolan earned the Certified Financial Planner™ (CFP®) professional designation in 2012. The CFP (Certified Financial Planner) is a professional certification granted by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). To attain the right to use the CFP mark, an individual must attain a bachelor's degree from a US college or university and complete a college level course of study covering financial planning topics including insurance planning, financial management, investment planning, tax planning, retirement planning, and estate planning. Currently, the individual must also pass a comprehensive 6-hour exam, complete at least 6000 hours of professional financial planning experience (or 4000 hours of apprenticeship experience), and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct. In addition, to maintain the right to continue to use the mark, an individual is required to complete continuing education coursework and continue to agree to be bound by the Code of Ethics and Standards of Conduct.

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

Christopher J. Dolan has no legal or disciplinary events to report.

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

Christopher J. Dolan 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. Dolan. Mr. Dolan may earn commissions, fees and/or incentive awards for these activities.

Christopher J. Dolan has no other business activities to report.

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

Christopher J. Dolan 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.