

## FORM ADV PART 2B BROCHURE SUPPLEMENT

David J. Boyd

### **Item 1 – Cover Page**

#### **David J. Boyd**

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

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

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

#### **David J. Boyd**

06/22/1995  
CRD# 7248887

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

Utah Valley University, Bachelor Degree in Personal Financial Planning, 2020  
Dixie State University, Associate of Arts, 2017

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2022 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 09/2022 to Present  
Arista Wealth Management, Investment Advisor Representative, 01/2021 to 08/2022  
Arista Wealth Management, Junior Financial Planner, 01/2021 to 08/2022  
Mountain America Credit Union, Financial Services Intern, 04/2020 to 08/2020  
NASPO ValuePoint, eMarket Center Customer Service Representative, 11/2016 – 05/2020  
Utah Valley University, Student, 08/2017 to 12/2020  
Nu Skin Enterprises, Cantonese Customer Service, 04/2017 to 07/2018  
Caption Call, Customer Service, 03/2016 to 02/2017  
Church of Jesus Christ of Latter Day Saints, Service Missionary, 02/2014 to 02/2016

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

David J. Boyd holds the Certified Financial Planner™ (CFP®) professional designation. 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**

David J. Boyd has no legal or disciplinary events to report.

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

David J. Boyd is a licensed 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. Boyd. Mr. Boyd may earn commissions, fees and/or incentive awards for these activities.

David J. Boyd has no other business activities to report.

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

David J. Boyd 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.