

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Dylan M. Wathen

### **Item 1 – Cover Page**

#### **Dylan M. Wathen**

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

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

#### **Dylan M. Wathen**

01/20/2000  
CRD# 7842005

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

Utah Valley University, Bachelor’s Degree, 2018-2022

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative/Client Services, 02/2023 to Present  
B.O.S.S. Retirement Solutions, Client Services, 02/2023 to Present  
Lending Club, Payment Solutions Specialist, 05/2022 to 02/2023

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

Dylan M. Wathen has no legal or disciplinary events to report.

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

Dylan M. Wathen 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. Wathen. Mr. Wathen may earn commissions, fees and/or incentive awards for these activities.

Dylan M. Wathen has no other business activities to report.

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

Dylan M. Wathen 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.