

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Julia K. Steppan

### **Item 1 – Cover Page**

#### **Julia K. Steppan**

B.O.S.S. Retirement Advisors, LLC

Located at:

10210 NE Points Drive, Suite 110

Kirkland, WA 98033

425-822-8282

Home Office:

2500 Executive Pkwy, Suite 500

Lehi, UT 84048

801-990-5055

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

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

#### **Julia K. Steppan**

07/12/1996

CRD # 7039013

#### ***Post Secondary Educational Background:***

Colorado State University, 2017

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 06/2022 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 06/2022 to Present

AE Wealth Management, LLC, Investment Adviser Representative, 01/2021 to 07/2021

Becker Retirement Group, Financial Advisor, 01/2021 to 07/2021

Bank of America, N.A., Financial Advisor Trainee – FADP, 10/2018 – 12/2020

Merrill Lynch, Pierce, Fenner & Smith Inc., Financial Advisor Trainee – FADP, 10/2018 – 12/2020

Honeymoon Financial Strategies, Assistant Marketing Associate, 07/2018 – 09/2018

### ***Chartered Retirement Planning Counselor (CRPC®)***

Julia K. Steppan is a Chartered Retirement Planning Counselor (CRPC®). This designation is granted by the College for Financial Planning. Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment. Candidates must also successfully pass a final exam and agree to adhere to Standards of Professional Conduct. In addition, to maintain the right to continue to use the designation, an individual must complete 16 hours of continuing education every two years

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

Julia K. Steppan has no legal or disciplinary events to report.

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

Julia K. Steppan 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 Ms. Steppan. Ms. Steppan may earn commissions, fees and/or incentive awards for these activities.

Ms. Steppan has no other outside business activities to report.

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

Julia K. Steppan 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.