

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Kelly L. Holtman

### **Item 1 – Cover Page**

#### **Kelly L. Holtman**

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

Located at:

2225 Washington Blvd., Suite 150

Ogden, UT 84401

801-990-5055

Home Office:

2500 Executive Pkwy, Suite 500

Lehi, UT 84048

801-990-5055

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

Date of Supplement: December 15, 2025

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

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

#### **Kelly L. Holtman**

03/17/1968

CRD# 5098214

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

Westminster College of Salt Lake City, Bachelor of Business, 1991

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 02/2024 to Present

B.O.S.S. Retirement Solutions, Insurance Agent, 02/2024 to Present

Raymond James Financial Services, Inc., Financial Advisor, 07/2020 to 02/2024

Wells Fargo Advisors, Registered Representative, 01/2020 to 07/2020

Soltis Investment Advisors, LLC, Advisor, 05/2019 to 12/2019

Triad Advisors, Financial Advisor, 12/2017 to 05/2019

LPL Financial LLC, Operations Manager, 02/2011 to 12/2017

Hightower Securities, Registered Associate, 03/2010 to 02/2011

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

Kelly L. Holtman has no legal or disciplinary events to report.

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

Kelly L. Holtman 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. Holtman. Ms. Holtman may earn commissions, fees and/or incentive awards for these activities.

Kelly L. Holtman has no other outside business activities to report.

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

Kelly L. Holtman 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.