

## FORM ADV PART 2B BROCHURE SUPPLEMENT

Michael R. Fortin

### **Item 1 – Cover Page**

#### **Michael R. Fortin**

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 Michael R. Fortin 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 Michael R. Fortin is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

#### **Michael R. Fortin**

05/29/1972  
CRD# 7157461

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

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 11/2025 to Present  
B.O.S.S. Retirement Solutions, Insurance Agent, 11/2025 to Present  
LPL Enterprise LLC, Registered Representative, 10/2025 to 11/2025  
Fidelity Investments, Investment Solutions Representative, 10/2020 to 09/2025  
Insure Right Insurance Agency, Producer, 10/2019 to 11/2020  
GoHealth, Senior Benefits Advisor, 07/2020 to 10/2020  
Mountain West Advisors, Financial Representative, 04/2019 to 10/2020  
Farmers Insurance, Agent, 01/2018 to 04/2019  
Womply, Inside Sales Representative, 01/2018 to 03/2018  
Comcast, Regional Sales Academy Manager, 08/2011 to 01/2018

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

Michael R. Fortin has no legal or disciplinary events to report.

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

Michael R. Michael R. Fortin is a licensed insurance agent and may recommend transactions in insurance or annuity products for clients through various insurance companies. Clients are under Boss Retirement Advisors, LLC

no obligation to engage in any insurance transactions recommended by Mr. Fortin. Mr. Fortin may earn commissions, fees and/or incentive awards for these activities.

Michael R. Fortin has no other business activities to report.

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

Michael R. Fortin 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.