

FORM ADV PART 2B BROCHURE SUPPLEMENT

Drake Puzey

Item 1 – Cover Page

Drake Puzey

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

Located at:

2501 E State Ave., Suite 120

Meridian, ID 83642

801-990-5055

Home Office:

2500 Executive Pkwy, Suite 500

Lehi, UT 84048

801-990-5055

www.bossretirement.com

Date of Supplement: June 30, 2026

This brochure supplement provides information about Drake Puzey 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 Drake Puzey is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Drake Puzey

06/27/1996

CRD# 7337081

Post-Secondary Educational Background

Utah Valley University, Bachelor’s Degree in Personal Financial Planning, 2021

Utah Valley University, Associates in Business Management, 2021

Business Background

B.O.S.S. Retirement Advisors, Investment Advisor Representative, 09/2021 to Present

B.O.S.S. Retirement Solutions, Servicing Advisor, 07/2021 to Present

Equitable Advisors, Associate Planner, 01/2021 – 07/2021

EnerbankUSA, Quality Assurance Specialist, 04/2019 – 01/2021

EnerbankUSA, Lender, 06/2017 – 04/2019

Utah Community Credit Union, Member Service Representative, 06/2016 – 06/2017

Item 3 – Disciplinary Information

Drake Puzey has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Drake Puzey 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. Puzey. Mr. Puzey may earn commissions, fees and/or incentive awards for these activities.

Drake Puzey has no other business activities to report.

Item 5 – Additional Compensation

Drake Puzey also serves in a separate capacity as insurance agent, and in that capacity, they can sell you life insurance, annuities, and other insurance products. Agent receives commissions and other compensation for the sale of insurance products. Commissions are paid by insurance carriers, vary from carrier to carrier and can change daily, and presently range from 1% to 9% based on various factors, including the type of product, the term of the product, and the initial investment value of the insurance contract. Additionally, the agent can qualify for incentives, bonuses, reward trips, and other compensation from BOSS, their insurance marketing organization, including AE, insurance companies, or related organizations based on insurance transactions. These incentives include, but are not limited to, trips, gifts, meals, entertainment, participation in bonus programs, reimbursement for training, marketing assistance, educational efforts, advertising, and travel expenses to conferences and events. 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.