



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
March 31, 2023

## **JOHN HEILNER**

CHIEF INVESTMENT OFFICER  
INVESTMENT ADVISOR REPRESENTATIVE

(800) 825-0616

[jheilner@wtwealthmanagement.com](mailto:jheilner@wtwealthmanagement.com)

7161 E. Rancho Vista Drive, Suite 112  
Scottsdale, AZ 85251

This brochure supplement provides information about John Heilner, Chief Investment Officer and Investment Adviser Representative of WT Wealth Management, LLC (“WTWM” or the “Firm”), that supplements the WT Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Dave Johnson, Chief Compliance Officer, if you did not receive WT Wealth Management, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm’s Investment Adviser Representatives is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The site is searchable by a unique identifying number known as a CRD number. Mr. Heilner’s CRD number is 2431461.

## **ITEM 2: EDUCATION AND BUSINESS EXPERIENCE**

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CRD No. 2431461

Year of Birth: 1966

### **Educational Background**

<b>Central CT State University</b> BS in Finance	<b>(1989 - 1993)</b>
<b>Northeastern University</b> <b>BS in Economics</b>	<b>(1984-1988)</b>

### **Business Experience**

<b>WT Wealth Management, LLC</b> Chief Investment Officer	<b>(May 2018 - Present)</b>
<b>WT Wealth Management, LLC</b> President, Chief Compliance Officer, Chief Investment Officer	<b>(Mar. 2012- May 2018)</b>
<b>Purshe Kaplan Sterling Investments</b> Registered Representative	<b>(Apr. 2015 – Feb. 2016)</b>
<b>Palo Verde Capital</b> Portfolio Manager	<b>(June 2012 – Apr. 2013)</b>
<b>Palo Verde Capital</b> Chief Economist	<b>(April 2011 – April 2013)</b>
<b>Renegade Classics</b> Owner	<b>(Feb. 2008 – Mar. 2011)</b>
<b>ING Mutual Funds</b> VP, National Mutual Fund Strategist	<b>(June 2000– Feb. 2008)</b>
<b>ING Mutual Funds</b> VP, National Sales Desk Manager	<b>(June 2000-June 2003)</b>

## **ITEM 3: DISCIPLINARY INFORMATION**

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Heilner.** Mr. Heilner has never been involved in any investment related regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Heilner.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft,

embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Heilner.**

However, we do encourage you to independently view the background of Mr. Heilner on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD No. 2431461.

#### **ITEM 4: OTHER BUSINESS ACTIVITIES**

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Mr. Heilner is the Manager of WT Tax Accounting, LLC. He spends approximately two (2) hours per month signing checks and performing payroll activities. WT Tax Accounting, LLC does not have the signatory authority for any client of WTWM's or for WTWM itself as an entity.

Mr. Heilner is a licensed insurance agent, and is not affiliated with any particular agency or actively pursuing insurance business. He spends less than two hours per month maintaining his licenses. Mr. Heilner may receive customary commissions resulting from insurance sales. Mr. Heilner therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, Mr. Heilner, as a fiduciary, will only recommend insurance products when he believes it to be in the client's best interest. Furthermore, clients are under no obligation to utilize Mr. Heilner to purchase insurance products.

#### **ITEM 5: ADDITIONAL COMPENSATION**

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Mr. Heilner does not receive any economic benefit from any person, company or organization, in exchange for providing clients advisory services through WT Wealth Management.

#### **ITEM 6: SUPERVISION**

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Mr. Heilner is the Chief Investment Officer and an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. Dave Johnson serves as WTWM's Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Mr. Johnson may be contacted at (435) 640-8236 or [djohnson@wtwealthmanagement.com](mailto:djohnson@wtwealthmanagement.com) for more information about this Brochure Supplement.