



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 31, 2023

KEVAN SCOTT PHILLIPS

SENIOR INVESTMENT ADVISOR

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Supervised From:

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

Located At:

Provo, UT. 84606

This brochure supplement provides information about Kevan Scott Phillips, Senior Investment Advisor 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. The site is searchable by a unique identifying number known as a CRD number. Mr. Phillip’s CRD number is 4382203.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 4382203
Year of Birth: 1958

Educational Background

**Brigham Young University – J. Reuben Clark
Law School** (1983-1986)
J.D. Degree

Brigham Young University (1977-1982)
BA in Accounting with Minor in English

Business Experience

WT Wealth Management (July 2020-Present)
Senior Investment Advisor

Northwestern Mutual Life (Feb. 2002-July 2020)
Wealth Management Advisor

Harris, Carter & Phillips Attorney at Law (July 1987-Aug. 2000)
Attorney at Law

New York Football Giants (Jan. 1982-June 1983)

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mr. Phillips. Mr. Phillips 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. Phillips.

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. Phillips.**

However, we do encourage you to independently view the background of Mr. Phillips on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 4382203.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Phillips maintains his insurance licenses and sells insurance products in the BOLI (Bank Owned Life Insurance) market and in the Credit Union markets. He also sells in the personal and business market. He spends approximately 10 hours a month in these insurance markets. Mr. Phillips may receive customary commissions resulting from insurance sales. Mr. Phillips therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, Mr. Phillips, 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. Phillips to purchase insurance products and may find similar services elsewhere.

Mr. Phillips serves as the Regional Managing Director of the Newcleus Group, for which he may receive commissions through the sale of BOLI products to banking institutions.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Phillips 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

Mr. Phillips is 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 for more information about this Brochure Supplement.