



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026

JACOB R. WEST

INVESTMENT ADVISOR

(800) 825-0616

jwest@wtwealthmanagement.com

Supervised From:
20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located at:
10716 South Dimple Dell Drive
Sandy, Utah, 84092

This brochure supplement provides information about Jacob R. West, 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. West’s CRD number is 7785395.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 7785395
Year of Birth: 1999

Educational Background

University of Oregon (Sep. 2019- Jun. 2023)
Bachelor of Arts in Business Administration
Bachelor of Arts in Psychology

Business Experience

Investment Advisor (Jul. 2023 - Present)
WT Wealth Management, LLC

Chief Executive Officer (Jun. 2024 - Present)
Smilin'

Tech Consultant (Feb. 2025 - Present)
Quest Consulting, LLC

Partner/Owner/Member (Feb. 2025 - Present)
Black Mountain Investment Group

General Partner (Apr. 2025 - Present)
Black Mountain Investments (fka The Jupiter Fund)

Financial Service Specialist (Jun. 2024 - Dec. 2024)
WT Wealth Management, LLC

ITEM 3: DISCIPLINARY INFORMATION

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

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. West.**

However, we do encourage you to independently view the background of Mr. West on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 7785395.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. West is a Tech Consultant for Quest Consulting, LLC, (“QC”) a limited liability company wholly owned by Mr. West, that provides technology consulting solutions for Black Mountain Investment Group (“BMIG”), of which Mr. West is an equity partner. BMIG is a technology solutions company that provides back-office management and technology consulting for companies needing modernization and is not an investment-related activity. Mr. West spends 2 to 5 hours per month on this activity, at times that do not interfere with his duty to WTWM nor its Clients.

Mr. West is a General Partner (“GP”) of Black Mountain Investments (“BMI”) (f.k.a The Jupiter Fund), which engages in cryptocurrency, private company, and general stock market investing. Mr. West’s role for BMI is limited to voting on GP matters and executing stock market trades, and is not involved in capital raising, soliciting, or client advisory activities. Mr. West spends 15 to 20 hours per month on this activity, at times that do not interfere with his duty to WTWM nor its Clients.

Mr. West is the Chief Executive Officer of Smilin’, a startup social media company and is non-investment related. Mr. West oversees product development, market strategy, team leadership and investor relations. Mr. West spends 1 to 3 hours per month on these activities, at times that do not interfere with his duty to WTWM nor its Clients.

ITEM 5: ADDITIONAL COMPENSATION

Mr. West does not receive any economic benefit from any person, company or organization, other than the client, in exchange for providing clients advisory services through WTWM.

Mr. West is compensated for his technology consulting services provided to BMIG through QC on a commission basis. Mr. West is therefore incentivized to generate leads for BMIG. To mitigate this conflict, WTWM has processes and procedures in place to supervise Mr. West’s activities under this other business activity (“OBA”) in relation to any current or potential Client of WTWM.

Mr. West has an ownership interest in BMIG, BMI, QC and Smilin’ and is thus incentivized to make decisions or take actions aimed at increasing the value of these companies. To mitigate any potential conflict of interest, Mr. West’s activities related to these OBAs are limited to voting, equity trading, and providing technology consulting services as described above.

ITEM 6: SUPERVISION

Mr. West is an Investment Advisor 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 (800) 825-0616 or

compliance@wtwealthmanagement.com for more information about this Brochure Supplement.