



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
March 3, 2026

**JOHN HEILNER**

CHIEF INVESTMENT OFFICER  
SENIOR INVESTMENT ADVISOR

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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 Senior Investment Advisor President, Chief Compliance Officer, Chief Investment Officer	<b>(Nov. 2013 - Present)</b> (May 2018 – Present) (Jan. 2018 – Present) (Nov. 2013- May 2018)
<b>WT Tax Accounting</b> Manager	<b>(Jul. 2014 – Aug. 2023)</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 dedicated to the clients of WT Wealth Management and does not currently engage in any other business activities.

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

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Mr. Heilner does not receive any economic benefit from any person, company or organization, other than the client, 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 a Senior 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](mailto:compliance@wtwealthmanagement.com) for more information about this Brochure Supplement.