



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
September 1, 2026**

LANCE LUNDGREN

INVESTMENT ADVISOR

(800) 825-0616

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Supervised From:
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Located At:
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This brochure supplement provides information about Lance Lundgren, 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. The site is searchable by a unique identifying number known as a CRD number. Mr. Lundgren's CRD number is 8272947.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 8272947

Year of Birth: 2003

Educational Background

Northern Arizona University

(2021 – 2024)

BS in Finance

Business Experience

WT Wealth Management, LLC

(Apr. 2026 – Present)

Financial Service Specialist

(Apr. 2026 – Present)

Investment Advisor Representative

(Aug. 2026 – Present)

National Bank of Arizona

(Aug. 2024 – Apr. 2026)

Relationship Banker

Exhale Bikes, Inc.

(Apr. 2019 – Aug. 2024)

Sales Associate

Northern Arizona University

(Aug. 2021 – May 2024)

Student

ITEM 3: DISCIPLINARY INFORMATION

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

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. Lundgren.**

However, we do encourage you to independently view the background of Mr. Lundgren on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 8272947.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Lundgren is dedicated to the clients of WT Wealth Management and does not currently engage in any other business activities.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Lundgren 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

Mr. Lundgren 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.