



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

ALLEN ATKINS, PH.D.

SENIOR INVESTMENT ADVISOR

(928) 225-2474

aatkins@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

813 N Beaver St
Flagstaff, AZ 86001

This brochure supplement provides information about Dr. Allen Atkins, 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. Dr. Atkins' CRD number is 6239393.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6239393

Year of Birth: 1951

Educational Background

University of Texas at Austin (1988)
PhD

Stephen F. Austin State University (1982)
MBA

Dartmouth College (1973)
BA

Business Experience

WT Wealth Management, LLC (Jan. 2022 – Present)
Senior Investment Advisor

WT Wealth Management, LLC (Jan. 2018 – Jan. 2022)
Chief Marketing Strategist

Northern Arizona University (Apr. 1998 – Aug. 2020)
Professor of Finance

Four Peaks Wealth Management, LLC (Oct. 2012 – Mar. 2018)
Chief Market Strategist/Member

Four Peaks Wealth Sedona, LLC (Feb. 2017 – Nov. 2017)
Member

University of Arizona (Aug. 1988 – Aug. 1998)
Assistant Professor of Finance

Berger Entrepreneurship Program, University of Arizona (Jul. 1995 – Jul. 1998)
Associate Director, Karl Eller Center

University of Auckland (May 1993 – Aug. 1993)
Visiting Senior Lecturer in Finance

University of Texas (Aug. 1985 – May 1988)
Assistant Instructor of Finance

Stephen F. Austin State University (Jan. 1983 – May 1983)
Assistant Instructor of Management and Marketing

Barnett's Tax Service (Jan. 1978 – May 1979)
Income Tax Consultant

Professional Designation

Professor of Finance Emeritus

ITEM 3: DISCIPLINARY INFORMATION

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

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. Atkins.**

However, we do encourage you to independently view the background of Mr. Atkins on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 6239393.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

ITEM 5: ADDITIONAL COMPENSATION

Dr. Atkins 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

Dr. Atkins is 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 for more information about this Brochure Supplement.



WEALTHMANAGEMENT

FORM ADV PART 2B BROCHURE SUPPLEMENT

March 3, 2026

AUSTIN ROGERS

INVESTMENT ADVISOR
FINANCIAL SERVICE SPECIALIST

(928) 225-2474

arogers@wtwealthmanagement.com

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

Located At:
3949 Almondwood Drive
Las Vegas, NV 89120

This brochure supplement provides information about Austin Rogers, Investment Advisor and Financial Service Specialist 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. Austin Rogers's CRD number is 7518550.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 7518550

Year of Birth: 1998

Educational Background

The University of Tennessee at Martin (2020)
BS in Accounting & Finance

Business Experience

WT Wealth Management, LLC (Jun. 2024 – Present)
Financial Service Specialist

Pinstripe Investments, LLC (Mar. 2023 – Present)
Owner & Sole Member

WT Wealth Management, LLC (May 2022 – Present)
Investment Advisor Representative

WT Wealth Management, LLC (Mar. 2021 – June 2023)
Accounting & Compliance Administrator

The University of Tennessee at Martin (Aug. 2016 – May 2020)
Student

Field Works (June 2020 – Aug. 2020)
Head Canvasser

Sprout's Farmer Market (June 2018 – Aug. 2018)
Produce Clerk

ITEM 3: DISCIPLINARY INFORMATION

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

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. Rogers.**

However, we do encourage you to independently view the background of Mr. Rogers on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 7518550.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Rogers is 100% Owner and Sole Member of Pinstripe Investments, LLC (“Pinstripe”). All financial advisory activity related to his Investment Advisor Representative registration with WTWM is conducted through the entity. Mr. Rogers’ activities related to Pinstripe are basic administration and maintenance of the entity which take approximately two hours per month outside of securities trading hours.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Rogers 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. Rogers is an Investment Advisor and Financial Service Specialist 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.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

BRENT RANKIN, CMT

INVESTMENT ADVISOR
INVESTMENT MODEL & STRATEGY ANALYST
(928) 225-2474
brankin@wtwealthmanagement.com

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

Located At:
57830 East 14th Street
Wayne, Nebraska 68787

This brochure supplement provides information about Brent Rankin, Investment Advisor and Investment Model and Strategy Analyst 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. Brent Rankin’s CRD number is 6482037.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6482037

Year of Birth: 1984

Educational Background

Western Governors University

(2018 - 2020)

BS in Business Management

Business Experience

WT Wealth Management, LLC

(Aug. 2020 - Present)

Investment Advisor, Investment Model & Strategy Analyst

JP Morgan Securities

(Jun. 2020- Aug. 2020)

Licensed Banker

JP Morgan Chase Bank

(Mar. 2020 - Aug. 2020)

Private Client Banker

Charles Schwab & Co., Inc.

(Apr. 2015 - Jun. 2019)

Registered Representative

ITEM 3: DISCIPLINARY INFORMATION

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

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. Rankin.**

However, we do encourage you to independently view the background of Mr. Rankin on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 6482037.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

ITEM 5: ADDITIONAL COMPENSATION

Mr. Rankin 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. Rankin is an Investment Advisor and the Investment Model and Strategy Analyst with 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.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026

THOMAS CLAYTON SIMMONS

SENIOR INVESTMENT ADVISOR

(800) 825-0616

csimmons@wtwealthmanagement.com

Supervised from and located at:
20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

This brochure supplement provides information about Thomas Clayton Simmons, 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. Simmons' CRD number is 2045436.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 2045436

Year of Birth: 1959

Business Experience

WT Wealth Management, LLC Senior Investment Advisor	(Nov. 2023 – Present)
TCS Financial, LLC President	(Jun. 2009 - Present)
TCS Financial, LLC President, CCO & Investment Advisor Representative	(Jun. 2009 – Nov. 2023)
Allstate Financial Advisor	(Oct. 2008 – Feb. 2009)
First Financial Equity Corporation Vice President	(Apr. 2004 – Sep. 2008)
Morgan Stanley & Co. Corporation Vice President	(Jun. 1997 – Apr. 2004)
Dean Witter Reynolds Vice President	(Jan. 1997 – May 1997)

ITEM 3: DISCIPLINARY INFORMATION

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

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. Simmons.**

However, we do encourage you to independently view the background of Mr. Simmons on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 2045436.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Simmons is 100% owner of TCS Financial, LLC, a financial services consulting business providing business and insurance advice. He spends approximately 10 to 15 hours per week on this activity.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Simmons 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.

Mr. Simmons receives compensation “trails” for insurance products sold to Clients prior to his affiliation with WT Wealth Management’s Insurance Agency, which was formed in 2024. Mr. Simmons has an incentive to keep his insurance Clients in these policies to perpetuate the commission trails. To mitigate this conflict, Mr. Simmons, as a fiduciary, will advise in the best interest of his Clients and their financial arrangements, including insurance products.

ITEM 6: SUPERVISION

Mr. Simmons is a Senior Investment Advisor with 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.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

EILEEN M. PROUD

SENIOR INVESTMENT ADVISOR
(800) 825-0616
eproud@wtwealthmanagement.com

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

Located At:
545 Channelside Drive, Unit A2408
Tampa, FL 33602

This brochure supplement provides information about Eileen M. Proud, 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. Mrs. Proud's CRD number is 1019703.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 1019703

Year of Birth: 1954

Educational Background

Kaplan University

(2017)

Wealth Management Specialist

Business Experience

WT Wealth Management, LLC

(Dec. 2015 – Present)

Investment Advisor Representative, Senior
Investment Advisor

True Financial Wealth Management Firm, LLC

(March 2006 – Present)

Member, Owner, President

True Financial Wealth Management Firm, LLC

(May 2006 – Nov. 2020)

Investment Advisor Representative

Financial Advisors of America, LLC

(Jan. 2008 – Apr. 2013)

Registered Representative, Investment Advisor
Representative

Girard Securities, Inc.

(Sept. 2002 – Dec. 2007)

Registered Representative, Investment Advisor
Representative

Sentra Securities Corporation

(Jul. 1985 – Sept. 2002)

Registered Representative, Investment Advisor
Representative

Private Ledger

(Feb. 1981 – July 1985)

Registered Representative, Investment Advisor
Representative

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mrs. Proud that are material in nature to a client's perspective.

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.

However, we do encourage you to independently view the background of Mrs. Proud on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or his Individual CRD No. 1019703.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mrs. Proud is the Owner, President and Member of True Financial Wealth Management, LLC. Mrs. Proud does not actively engage in activities related to the entity other than basic administration and maintenance. This activity accounts for approximately two hours per month of Mrs. Proud's time.

ITEM 5: ADDITIONAL COMPENSATION

Mrs. Proud 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.

Mrs. Proud receives compensation "trails" for insurance products sold to Clients prior to her affiliation with WT Wealth Management's Insurance Agency, which was formed in 2024. Mrs. Proud no longer maintains an active insurance license and therefore does not currently engage in any new insurance policy writing activities.

ITEM 6: SUPERVISION

Mrs. Proud is 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 for more information about this Brochure Supplement.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

EMY TICE

CERTIFIED FINANCIAL PLANNER

(928) 225-2474

etice@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

813 N Beaver St.
Flagstaff, AZ 86001

This brochure supplement provides information about Emy Tice, Certified Financial Planner 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. Mrs. Tice's CRD number is 6499262.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6499262

Year of Birth: 1969

Educational Background

University of Georgia, Terry College of Business (2014)
Certificate in Financial Planning

Northern Arizona University (1994)
MBA

Northern Arizona University (1993)
BSBA Finance

Business Experience

WT Wealth Management, LLC (Jan. 2018 – Present)
Certified Financial Planner

Northern Arizona University, W.A. Franke College of Business (Aug. 2024 – Present)
Teaching Professor of Finance

Northern Arizona University, W.A. Franke College of Business (Aug. 2022- Aug 2024)
Associate Teaching Professor of Finance

Northern Arizona University, W.A. Franke College of Business (Aug. 2017 –Aug. 2022)
Senior Lecturer of Finance

Northern Arizona University, W.A. Franke College of Business (Aug. 2011 – Aug. 2017)
Lecturer of Finance

Four Peaks Wealth Management, LLC (Dec. 2016 – Jan. 2018)
Certified Financial Planner

Four Peaks Wealth Management, LLC (Jun. 2015 – Dec. 2016)
Financial Advisor

Boyer Heating and Cooling (Jan. 2003 – Aug. 2011)
General Manager

Boyer Heating and Cooling (Mar. 1995 – Jan. 2003)
Business Manager

Northern Arizona University, W.A. Franke College of Business (Jan. 1995 - May 2011)
Part-Time Instructor of Business

Professional Designations

CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates must complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board’s code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mrs. Tice. Mrs. Tice 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 Mrs. Tice.

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 Mrs. Tice.**

However, we do encourage you to independently view the background of Mrs. Tice on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD No. 6499262.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mrs. Tice serves as a Teaching Professor of Finance for Northern Arizona University. Mrs. Tice may spend as much as 50% of her time on this other business activity.

Mrs. Tice is also a Committee Member of the Education and Workforce Development Committee with the Greater Flagstaff Chamber of Commerce and spends 2 hours a month on this activity.

ITEM 5: ADDITIONAL COMPENSATION

Mrs. Tice does not receive any economic benefit from any person, company or organization, in exchange for providing clients advisory services through WT Wealth Management. Mrs. Tice receives a salary as a Teaching Professor for Northern Arizona University.

ITEM 6: SUPERVISION

Mrs. Tice is a Certified Financial Planner 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.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

GLENN LEEST

SENIOR INVESTMENT ADVISOR

(928) 225-2474

gleest@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

813 N Beaver St,
Flagstaff, AZ 86001

This brochure supplement provides information about Glenn Leest, 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. Leest's CRD number is 6234623.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6234623

Year of Birth: 1985

Educational Background

Coconino Community College

(2013)

Associate degree

Business Experience

WT Wealth Management, LLC

(Jan. 2018 - Present)

Senior Investment Advisor

Andrizo Investing, PLLC

(Jan 2019 - Present)

Owner, Member and Manager

Four Peaks Wealth Management, LLC

(May 2015 - Dec. 2017)

Investment Advisor Representative

Spence Cassidy and Associates, LLC

(Jun. 2013 - May 2015)

Insurance Agent

OneAmerica Securities, Inc.

(Jun. 2013 - May 2015)

Registered Representative

ITEM 3: DISCIPLINARY INFORMATION

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

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. Leest.**

However, we do encourage you to independently view the background of Mr. Leest on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 6234623.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Leest is 100% Owner and Sole Member of Andrizo Investing, PLLC ("Andrizo"). All financial advisory activity related to his Investment Advisor Representative registration

with WTWM is conducted through the entity. Mr. Leest's activities related to Andrizo are basic administration and maintenance of the entity which take approximately two hours per month outside of securities trading hours.

ITEM 5: ADDITIONAL COMPENSATION

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



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 1, 2026

JACKSON ROGERS

INVESTMENT ADVISOR REPRESENTATIVE

(800) 825-0616

jrogers@wtwealthmanagement.com

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

Located at:
282 East Hollywood Avenue
Salt Lake City, UT 84115

This brochure supplement provides information about Jackson Rogers, Investment Advisor 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. Rogers’s CRD number is 7169007.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 7169007

Year of Birth: 1994

Educational Background

Arizona State University

(2017)

BS in Economics

McGill University

Studies in Finance

Business Experience

WT Wealth Management, LLC

(Sep. 2019 – Present*)

Investment Advisor Representative

WT Wealth Management, LLC

(Jan. 2024 – Jan. 2025)

Chief Compliance Officer

WesternTrust, L.P.

(Jun. 2019 – Dec. 2022)

Director of Hospitality Products

Arizona State University

(Aug. 2015 – Dec. 2017)

Student

WT Wealth Management, LLC

(Jun. 2015 – Dec. 2016)

Intern / Equity Analyst

McGill University

(Aug. 2013 – May 2015)

Student

**Though his registration remains active with WTWM, currently Mr. Rogers is not advising Clients.*

ITEM 3: DISCIPLINARY INFORMATION

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

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. Rogers.**

However, we do encourage you to independently view the background of Mr. Rogers on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 7169007.

ITEM 4: OTHER BUSINESS ACTIVITIES

Though his registration remains active through WTWM, currently Mr. Rogers is not advising Clients and is engaged in other non-investment-related business activities.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Rogers 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. However, Mr. Rogers is not currently advising clients.

Mr. Rogers receives compensation through his other non-investment-related business activities.

ITEM 6: SUPERVISION

Mr. Rogers 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 (800) 825-0616 or compliance@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

**FORM ADV PART 2B
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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.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

JOHN HEILNER

**CHIEF INVESTMENT OFFICER
SENIOR INVESTMENT ADVISOR**

(800) 825-0616

jheilner@wtwealthmanagement.com

**Supervised from and located at:
20865 North 90th Place, Suite 105
Scottsdale, AZ 85255**

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. 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

CRD No. 2431461

Year of Birth: 1966

Educational Background

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

Business Experience

WT Wealth Management, LLC Chief Investment Officer Senior Investment Advisor President, Chief Compliance Officer, Chief Investment Officer	(Nov. 2013 - Present) (May 2018 – Present) (Jan. 2018 – Present) (Nov. 2013- May 2018)
WT Tax Accounting Manager	(Jul. 2014 – Aug. 2023)
Purshe Kaplan Sterling Investments Registered Representative	(Apr. 2015 – Feb. 2016)
Palo Verde Capital Portfolio Manager	(June 2012 – Apr. 2013)
Palo Verde Capital Chief Economist	(April 2011 – April 2013)
Renegade Classics Owner	(Feb. 2008 – Mar. 2011)
ING Mutual Funds VP, National Mutual Fund Strategist	(June 2000– Feb. 2008)
ING Mutual Funds VP, National Sales Desk Manager	(June 2000-June 2003)

ITEM 3: DISCIPLINARY INFORMATION

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 by searching with his full name or his Individual CRD No. 2431461.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

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

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 for more information about this Brochure Supplement.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

ROBERT F. REDWANC

SENIOR INVESTMENT ADVISOR

(800) 825-0616

redwanc@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

545 Channelside Drive, Unit A2408
Tampa, FL 33602

This brochure supplement provides information about Robert F. Redwanc, 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. Redwanc's CRD number is 4354455.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 4354455

Year of Birth: 1956

WT Wealth Management, LLC Investment Advisor Representative, Senior Investment Advisor	(Dec. 2015 – Present)
True Financial Wealth Management Firm, LLC Member, Owner, Vice President	(Mar. 2006– Present)
True Financial Wealth Management Firm, LLC Investment Advisor Representative	(Mar. 2013 – Nov. 2020)
Financial Advisors of America, LLC Investment Advisor Representative, Registered Representative	(Jan. 2008 – Apr. 2013)
Girard Securities, Inc. Registered Representative, Investment Advisor Representative	(Mar. 2005 – Dec. 2007)
Sentra Securities Corporation Registered Representative	(Feb. 2001 – Oct. 2002)

Mr. Redwanc has no formal education after high school to disclose.

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mr. Redwanc that are material to a client's perspective.

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.

However, we do encourage you to independently view the background of Mr. Redwanc on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 4354455.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Redwanc is the Owner, Vice President and Member of True Financial Wealth Management, LLC. Mr. Redwanc does not actively engage in activities related to the entity

other than basic administration and maintenance. This activity accounts for approximately two hours per month of Mr. Redwanc's time.

ITEM 5: ADDITIONAL COMPENSATION

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



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026**

KEVAN SCOTT PHILLIPS

SENIOR INVESTMENT ADVISOR

(800) 825-0616

kphillips@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

1435 East 950 South
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. Phillips' 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-Jul. 2020)

Wealth Management Advisor

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

Attorney at Law

New York Football Giants (Jan. 1982-Jun. 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 is dedicated to the clients of WTWM and does not currently engage in any other business activities.

Mr. Phillips serves in a voluntary capacity as a member of the Presidency of the Provo City Center Temple of the Church of Jesus Christ of Latter-day Saints. Mr Phillips spends an average of 25 hours per week in this volunteer service.

ITEM 5: ADDITIONAL COMPENSATION

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



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
March 3, 2026

STEVEN MELCHER-STREET

INVESTMENT ADVISOR REPRESENTATIVE

(928) 225-2474

ssstreet@wtwealthmanagement.com

Supervised From:

20865 North 90th Place, Suite 105
Scottsdale, AZ 85255

Located At:

813 N Beaver St.
Flagstaff, AZ 86001

This brochure supplement provides information about Steven Street, 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. Street's CRD number is 7456139.

ITEM 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 7456139
Year of Birth: 1994

WT Wealth Management, LLC

Investment Adviser
Associate

(Feb 2024 - Present)

(Oct 2025 – Present)

(Feb 2024 – Sep 2025)

JP Morgan Chase Bank & Securities

Relationship Banker & Licensed

(Sep 2021 – Feb 2024)

Wells Fargo Bank, NA

Personal Banker

(Sep 2014 – Aug 2021)

ITEM 3: DISCIPLINARY INFORMATION

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

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. Street.**

However, we do encourage you to independently view the background of Mr. Street on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 7456139.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

ITEM 5: ADDITIONAL COMPENSATION

Mr. Street 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. Street is an Investment Advisor 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 (800) 825-0616 or compliance@wtwealthmanagement.com for more information about this Brochure Supplement.



WEALTHMANAGEMENT

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

LANCE LUNDGREN

INVESTMENT ADVISOR

(800) 825-0616

llundgren@wtwealthmanagement.com

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

Located At:
813 N Beaver St,
Flagstaff, AZ 86001

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
BS in Finance

(2021 – 2024)

Business Experience

WT Wealth Management, LLC
Financial Service Specialist
Investment Advisor Representative

(Apr. 2026 – Present)

(Apr. 2026 – Present)

(Aug. 2026 – Present)

National Bank of Arizona
Relationship Banker

(Aug. 2024 – Apr. 2026)

Exhale Bikes, Inc.
Sales Associate

(Apr. 2019 – Aug. 2024)

Northern Arizona University
Student

(Aug. 2021 – May 2024)

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.