

FORM ADV PART 2B BROCHURE SUPPLEMENT MARCH 9, 2017

EILEEN M. PROUD

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: emproud@wtwealthmanagement.com

Address: 4575 Dean Martin Drive, Suite 1806

Las Vegas, NV 89103

This Brochure Supplement provides information about the qualifications of Eileen M. Proud, an Investment Adviser Representative of WT Wealth Management, LLC ("WTWM" or the "Firm").

Eileen M. Proud will not provide investment advice to New York residents.



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. Eileen M. Proud's CRD number is 1019703.

ITEM 1 **BACKGROUND**

A. GENERAL REQUIREMENTS

Generally, WTWM requires employees to have relevant work experience in the securities industry. Any employee of WTWM acting in a representative capacity will be appropriately licensed and registered as such.

B. Investment Adviser Representative Information

We currently have three (3) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Eileen M. Proud**.

EDUCATION AND BUSINESS EXPERIENCE ITEM 2

CRD No. 1019703

Year of Birth: 1954

Educational Background

Academy of Certified Financial Divorce Specialists (2016)

Earned CFDS designation

Institute of Certified Divorce Financial Analysts (2016)

Earned CDFA designation

College of Financial Planning (1984 - 2004)

Earned CFP designation

CFP license is no longer active.

Business Experience

Investment Advisor Representative Dec. 2015 - Present

WT Wealth Management, LLC

Member, Owner, President May 2006 - Present

True Financial Wealth Management Firm, LLC

fka True Financial Advisory Firm, LLC

Registered Representative, Investment Advisor Jan. 2008 - Apr. 2013

Representative

Financial Advisors of America, LLC

Registered Representative, Investment Advisor Sept. 2002 – Jan. 2008

Representative



Girard Securities, Inc.

Designation Descriptions

CFDA: The CDFA $^{\text{M}}$ designation is available to individuals who have a minimum of two years' experience as a financial professional, accountant, or matrimonial lawyer. To earn the designation, the participant must complete a series of self-study course modules and pass an exam for each module.

In the USA, this training qualifies for 32 hours of continuing education for the CFP® Board of Standards, 25 CPE credits for the CPA designation, and 32 PACE credits for ChFCs and CLUs. To retain the Certified Divorce Financial Analyst™ designation, a CDFA™ must obtain 20 hours of Continuing Education (CE) every two years (ten of which must be divorce-related), remain in good standing with the IDFA™, and keep his/her dues current.

CFDS: The CFDS® designation signifies that a certificant has attained comprehensive knowledge of the following subject matter:

- Divorce A Historical Perspective
- The Financial Affidavit
- Debt, Credit, & Bankruptcy
- Retirement/Pension Plans
- Social Security & Medicare
- Qualified Domestic Relations Orders (QDROs)
- Alimony & Related Issues
- Child Support & Related Issues
- Dividing the House 4
- Dividing the Property
- Divorce Tax Issues
- Legal Issues
- Mediation, An Alternative
- Collaborative Divorce
- Malpractice Issues
- Expert Witnesses
- Forensic Accounting
- Marketing
- Code of Ethics

The CFDS® designation is a self-study program that includes one 500+ page binder covering the subject matter above and Family Law Software program. This software will assist you in determining financial results when calculating "what if" scenarios such as: who keeps the house, who receives the 401(k), who assumes the visa card balance, etc.

To earn the designation, candidates must successfully complete one case study (submitted via email for grading) plus one test (taken online in the comfort of your home or office) within a one-year period of time.

ITEM 3 DISCIPLINARY INFORMATION

None. Eileen M. Proud does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Eileen M. Proud is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC. She spends approximately five (5) hours per month providing investment advisory services to clients. Dual registration may pose a conflict of interest based on compensation received rather than client needs. Eileen M. Proud and WTWM are committed to acting in the client's best interest. Any compensation is fully disclosed, in advance, to the client.

Eileen M. Proud also maintains her license to sell insurance, though she is not actively pursuing insurance business. She spends less than two (2) hours per month maintaining her license.

Though Eileen M. Proud has earned the CFP designation, she has allowed her license to lapse and it is no longer active.

ITEM 5 ADDITIONAL COMPENSATION

Eileen M. Proud is dually registered as an investment advisor representative with True Financial Wealth Management Firm, LLC and receives compensation for advisory services rendered through that firm.

ITEM 6 SUPERVISION

Eileen M. Proud is an Investment Adviser Representative of WTWM. WTWM provides investment advisory services in accordance with its policies and procedures manual. John Heilner serves as WTWM's Chief Investment Officer and Chief Compliance Officer and is primarily responsible for implementation of the Firm's policies and procedures. Eileen M. Proud may be contacted at (800) 825-0616 or emproud@wtwealthmanagement.com for more information about this Brochure Supplement.

ITEM 7 REQUIREMENTS FOR STATE-REGISTERED ADVISERS

A. Arbitration Claims



None. Eileen M. Proud has not been found liable in any arbitration claim alleging damages in excess of \$2,500 involving investment or investment-related business or activity, fraud, false statements or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting or extortion; or dishonest, unfair or unethical practices.

B. Self-Regulatory Organization or Administrative Proceedings

None. Eileen M. Proud has not been found liable in any civil, self-regulatory organization, or administrative proceeding involving an investment or investment-related business or activity, fraud, false statements or omissions, theft, embezzlement or other wrongful taking of property, bribery, forgery, counterfeiting, or extortion; or dishonest, unfair or unethical practices.

C. Bankruptcy Petitions

None. Eileen M. Proud has not been the subject of a bankruptcy petition at any time during the last 10 years.