

# FORM ADV PART 2B BROCHURE SUPPLEMENT JULY 1, 2018

# ALLEN ATKINS, PH.D.

CHIEF MARKET STRATEGIST,

INVESTMENT ADVISOR REPRESENTATIVE

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

#### 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 twelve (12) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Dr. Allen Atkins**.

#### ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6239393

Year of Birth: 1951

Educational Background

University of Texas at Austin (1988)

Earned PhD

Stephen F. Austin State University (1982)

Earned MBA

Dartmouth College (1973)

Earned BA

Business Experience

Chief Market Strategist Jan. 2018 - Present

WT Wealth Management, LLC

Member Mar. 2018 - Present

Four Peaks Wealth Management, LLC (unregistered)

Chief Market Strategist/Member Oct. 2012 - Mar. 2018

Four Peaks Wealth Management, LLC

Professor of Finance Apr. 2007 - Present

Northern Arizona University

Member Feb. 2017 - Nov. 2017

Four Peaks Wealth Sedona, LLC

#### **Assistant Professor of Finance**

University of Arizona

Aug. 1988 - Mar. 2007

#### Associate Director, Karl Eller Center

Jul. 1995 - Jul. 1998

Berger Entrepreneurship Program, University of Arizona

#### **Visiting Senior Lecturer in Finance**

May 1993 - Aug. 1993

University of Auckland (Auckland, New Zealand)

## **Assistant Instructor of Finance**

Jan. 1980 - May 1984

University of Texas

# **Assistant Instructor of Management and Marketing**

Jan. 1983 - May 1983

Stephen F. Austin State University

## **Income Tax Consultant**

Jan. 1978 - May 1979

Barnett's Tax Service

# ITEM 3 DISCIPLINARY INFORMATION

None. Dr. Atkins does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

# ITEM 4 OTHER BUSINESS ACTIVITIES

Dr. Atkins serves as a finance professor for Northern Arizona University. Dr. Atkins may spend as much as 75% of his time with his other business activity. Dr. Atkins is also a Member of Four Peaks Wealth Management, LLC. While Four Peaks is no longer a registered investment adviser, the firm is being maintained to hold the proceeds of its sale.

#### ITEM 5 ADDITIONAL COMPENSATION

Dr. Atkins receives a salary as a finance professor with Northern Arizona University.

#### ITEM 6 SUPERVISION

Dr. Allen Atkins 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 (435) 640-8236 or djohnson@wtwealthmanagement.com for more information about this Brochure Supplement.