



WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
JULY 1, 2018

**JOHN HEILNER**

CHIEF INVESTMENT OFFICER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: [jheilner@wtwealthmanagement.com](mailto:jheilner@wtwealthmanagement.com)

Address: 7161 E. Rancho Vista Drive, Suite 112  
Scottsdale, AZ 85251

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. John Heilner’s CRD number is 2431461.

## 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 **John Heilner**.

## ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 2431461

Year of Birth: 1966

### Educational Background

**Central CT State University** (1989 - 1993)

BS in Finance

**Northeastern University** (1984-1988)

BS in Economics

### Business Experience

**Chief Investment Officer** (Mar. 2013 - Present)

WT Wealth Management, LLC

**Chief Compliance Officer** (Mar. 2013- May 2018)

WT Wealth Management, LLC

**Registered Representative** (Apr. 2015 - Feb. 2016)

Purshe Kaplan Sterling Investments

**Portfolio Manager (registered)** (May 2012 - Apr. 2013)

Palo Verde Capital

**Economist (unregistered)** (Mar. 2011 - May 2012)

Palo Verde Capital

**President** (Feb. 2008 - Mar. 2011)

Renegade Classics

**Mutual Fund Strategist**

**(Jul. 2000 – Feb. 2008)**

ING Mutual Funds

### **ITEM 3 DISCIPLINARY INFORMATION**

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

### **ITEM 4 OTHER BUSINESS ACTIVITIES**

John Heilner is the Manager of WT Tax Accounting, LLC. He spends approximately two (2) hours per month signing checks and performing payroll activities. John Heilner also maintains his license to sell insurance, though he is not actively pursuing insurance business. He spends less than two (2) hours per month maintaining his license. WT Tax Accounting, LLC does not have a signatory authority for any client of WTWM's or for WTWM itself as an entity.

### **ITEM 5 ADDITIONAL COMPENSATION**

John Heilner does not receive any economic benefit from any third party for providing advisory services.

### **ITEM 6 SUPERVISION**

John Heilner is the Chief Investment Officer and 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](mailto:djohnson@wtwealthmanagement.com) for more information about this Brochure Supplement.