



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
JULY 1, 2018

MATTHEW HAERTZEN, CFA

SENIOR INVESTMENT ADVISOR

INVESTMENT ADVISOR REPRESENTATIVE

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This brochure supplement provides information about Matthew Haertzen, 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. Haertzen’s CRD number is 2405742.

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 **Matthew Haertzen**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 2405742

Year of Birth: 1971

Educational Background

University of Minnesota, Carlson School of Management (1994)

Earned MBA

University of Minnesota, Morris (1993)

Earned BA

Mr. Haertzen is a Chartered Financial Analyst (CFA). Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements are:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

Business Experience

Senior Investment Advisor

WT Wealth Management, LLC

Jan. 2018 – Present

Lecturer of Finance

Eller College of Management, University of Arizona

Jun. 2017 – Present

Member Four Peaks Wealth Management, LLC (unregistered)	Mar. 2018 – Present
Chief Executive Officer/Member Four Peaks Wealth Management, LLC	Oct. 2012 – Mar. 2018
Consultant Georgia Biofuels	Sep. 2011 – Dec. 2017
Managing Member Four Peaks Wealth Sedona, LLC	Feb. 2017 – Nov. 2017
Finance Professor Northern Arizona University	Aug. 2008 – May 2017
Consultant/Portfolio Manager CP Cogent Securities, LP	Aug. 2006 – Apr. 2013
Instructor Western Wyoming Community College	Aug. 2006 – May 2008
Chief Investment Officer CP Cogent Securities, LP	Jun. 2005 – Aug. 2006
Chief Investment Officer Idaho State Endowment Fund	Jan. 2003 – May 2005
Equity Portfolio Manager Washington Trust Bank	Mar. 2001 – Dec. 2002
Assistant Director Office of Asset Management, University of Minnesota	Mar. 1999 – Mar. 2001
Manager, Structured Products Quantitative Support American Express Financial Advisors	Apr. 1994 – Mar. 1999

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Haertzen serves as a Lecturer of Finance for Northern Arizona University. Mr. Haertzen may spend as much as 80% of his time with this other business activity. Mr. Haertzen 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

Mr. Haertzen receives a salary as a Lecturer at Northern Arizona University.

ITEM 6 SUPERVISION

Mr. Haertzen 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.