



WEALTHMANAGEMENT

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 1, 2019**

**RYAN STUART, CFA**

Business Director

INVESTMENT ADVISOR REPRESENTATIVE

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This brochure supplement provides information about Ryan Stuart, 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. Mr. Stuart’s CRD number is 6639504.

## 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 eleven (11) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Ryan Stuart**.

## ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6639504

Year of Birth: 1988

### Educational Background

**University of Colorado at Boulder, (2010)**  
**Leeds School of Business**  
Earned BA

Mr. Stuart 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

**Business Director Jan. 2018 – Present**  
WT Wealth Management, LLC

**Director Jan. 2017 – Nov. 2017**  
Four Peaks Wealth Sedona, LLC

<b>Director of Private Equity Investments/Member</b> Four Peaks Wealth Management, LLC	<b>Apr. 2016 – Mar. 2018</b>
<b>Manager of Global Transfer Pricing Services</b> KPMG Australia	<b>Jan. 2014 – Dec. 2015</b>
<b>Sr. Associate of Economic &amp; Valuation Services</b> KPMG, LLP	<b>Jun. 2009 – Jul. 2013</b>

### **ITEM 3 DISCIPLINARY INFORMATION**

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

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

From time to time, Mr. Stuart provides business and investment valuation consulting services for parent company Western Trust and clients of affiliate WT Tax Accounting, Mr. Stuart spends approximately 1% of his time on this activity.

### **ITEM 5 ADDITIONAL COMPENSATION**

Mr. Stuart receives compensation for his consulting services with Western Trust and WT Tax Accounting.

### **ITEM 6 SUPERVISION**

Mr. Stuart 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](mailto:djohnson@wtwealthmanagement.com) for more information about this Brochure Supplement.