



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 10, 2021**

JOHN HEILNER

CHIEF INVESTMENT OFFICER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: 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. 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 for more information about this Brochure Supplement.



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ROBERT F. REDWANC

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: redwanc@wtwealthmanagement.com

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

This brochure supplement provides information about Robert F. Redwanc, 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.

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ITEM 1 BACKGROUND

A. GENERAL REQUIREMENTS

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B. INVESTMENT ADVISER REPRESENTATIVE INFORMATION

We currently have twelve (12) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Robert F. Redwanc**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 4354455

Year of Birth: 1956

Educational Background

Academy of CFDS- currently a student

Business Experience:

Investment Advisor Representative WT Wealth Management, LLC	Dec. 2015 – Present
Member, Owner, Vice President, True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	Mar. 2013 – Present
Investment Adviser Representative True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	Mar. 2013 – Nov. 2020
Investment Advisor Representative, Registered Representative, Shareholder Financial Advisors of America, LLC	Jan. 2008 – Apr. 2013
Investment Advisor Representative Girard Securities, Inc.	Mar. 2005 – Jan. 2008
Registered Representative Girard Securities, Inc.	Sept. 2002 – Jan. 2008
Registered Representative, Investment Adviser Representative Sentra Securities Corporation	Mar. 2002 – Nov. 2002

ITEM 3 DISCIPLINARY INFORMATION

None. Robert F. Redwanc does not have any legal or disciplinary events material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Robert F. Redwanc does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Robert F. Redwanc does not receive any additional compensation.

ITEM 6 SUPERVISION

Robert F. Redwanc 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.



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EILEEN M. PROUD

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: eproud@wtwealthmanagement.com

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

This brochure supplement provides information about Eileen M. Proud, 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. 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 twelve (12) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Eileen M. Proud**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 1019703

Year of Birth: 1954

Educational Background

Kaplan University (2017)

Wealth Management Specialist

Academy of Certified Financial Divorce Specialists (2016)

Earned CFDS designation

CFDS license is no longer active.

Institute of Certified Divorce Financial Analysts (2016)

Earned CDFA designation

CFDA license is no longer active.

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

Investment Adviser Representative

True Financial Wealth Management Firm, LLC
fka True Financial Advisory Firm, LLC

May 2006 – Nov. 2020

**Registered Representative, Investment Advisor
Representative, Shareholder**

Financial Advisors of America, LLC

Jan. 2008 – Apr. 2013

**Registered Representative, Investment Advisor
Representative**

Girard Securities, Inc.

Sept. 2002 – Jan. 2008

**Registered Representative, Investment Advisor
Representative**

Sentra Securities Corporation

Jul. 1985 – Sept. 2002

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 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 does not receive any additional compensation.

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. 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.



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ALLEN ATKINS, PH.D.

CHIEF MARKET STRATEGIST,
INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: aatkins@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

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	

Professor of Finance Emeritus	Aug. 2020 – Present
Northern Arizona University	

Professor of Finance	Apr. 2007 – Aug. 2020
Northern Arizona University	

Chief Market Strategist/Member	Oct. 2012 – Mar. 2018
Four Peaks Wealth Management, LLC	

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 Berger Entrepreneurship Program, University of Arizona	Jul. 1995 – Jul. 1998
Visiting Senior Lecturer in Finance University of Auckland (Auckland, New Zealand)	May 1993 – Aug. 1993
Assistant Instructor of Finance University of Texas	Jan. 1980 – May 1984
Assistant Instructor of Management and Marketing Stephen F. Austin State University	Jan. 1983 – May 1983
Income Tax Consultant Barnett's Tax Service	Jan. 1978 – May 1979

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 Professor of Finance Emeritus for Northern Arizona University. Dr. Atkins may spend as much as 80% of his time with his other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Dr. Atkins receives a salary and benefits as Professor of Finance Emeritus 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.



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MATTHEW HAERTZEN, CFA

SENIOR INVESTMENT ADVISOR

INVESTMENT ADVISOR REPRESENTATIVE

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Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

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

CFA Designation

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.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

CFP Designation

Mr. Haertzen is a Certified Financial Planner. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the

“CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 86,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

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
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 the Eller College of Management at the University of Arizona. Mr. Haertzen may spend as much as 80% of his time with this other business activity.

Mr. Haertzen serves on the Board of Directors for three organizations: Tucson CFA Society, the Outlaws at Prospect Creek Home Owners' Association and Marana Health Care Benefits Trust. He spends approximately 5 hours per month on these activities and he does not receive compensation for his time or work in these roles.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Haertzen receives a salary as a Lecturer of Finance for the Eller College of Management at the University of Arizona.

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.



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RYAN STUART, CFA

Business Director

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: rstuart@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

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. 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 twelve (12) 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 Bachelor's Degree in Business Administration, with emphasis in Finance, and Quantitative Finance Certificate

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 Four Peaks Wealth Sedona, LLC	Jan. 2017 – Nov. 2017
Director of Private Equity Investments/Member Four Peaks Wealth Management, LLC	Apr. 2016 – Mar. 2018
Manager of Global Transfer Pricing Services KPMG Australia	Jan. 2014 – Dec. 2015
Sr. Associate of Economic & Valuation Services KPMG, LLP	Jun. 2009 – Jul. 2013

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 for more information about this Brochure Supplement.



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EMY TICE, CFP

CERTIFIED FINANCIAL PLANNER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: etice@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Emy Tice, 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.

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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 **Emy Tice**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6499262

Year of Birth: 1969

Educational Background

University of Georgia, Terry College of Business	(2014)
Certificate in Financial Planning	

Northern Arizona University	(1994)
MBA	

Northern Arizona University	(1993)
BSBA Finance	

Mrs. Tice is a Certified Financial Planner. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 86,000 individuals have obtained CFP® certification in the United States.

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- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services,

and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Experience

**Certified Financial Planner,
Investment Adviser Representative**
WT Wealth Management, LLC

Jan. 2018 – Present

Certified Financial Planner
Four Peaks Wealth Management, LLC

May. 2015 – Dec. 2017

Senior Lecturer of Finance
Northern Arizona University, W.A. Franke College of Business

Aug. 2011 – Present

General Manager
Boyer Heating and Cooling

Jan. 2003 – Aug. 2011

Business Manager
Boyer Heating and Cooling

Mar. 1995 – Jan. 2003

Part-Time Instructor of Business
Northern Arizona University, W.A. Franke College of Business

Jan. 1995 to May 2011

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mrs. Tice serves as a Senior Lecturer of Finance for Northern Arizona University. Mrs. Tice may spend as much as 70% of her time with this other business activity.

ITEM 5 ADDITIONAL COMPENSATION

Mrs. Tice receives a salary as a Senior Lecturer for Northern Arizona University.

ITEM 6 SUPERVISION

Mrs. Tice 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.



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GLENN LEEST

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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Flagstaff, AZ 86001

This brochure supplement provides information about Glenn Leest, 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.

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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 **Glenn Leest**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6234623

Year of Birth: 1985

Educational Background

Coconino Community College	(2013)
Earned an Associate Degree	

Business Experience

Investment Adviser Representative	Jan. 2018 – Present
WT Wealth Management, LLC	

Investment Adviser Representative	May 2015 – Dec. 2017
Four Peaks Wealth Management, LLC	

Registered Representative and Insurance Agent	Jun. 2013 – May 2015
Spence Cassidy and Associates, LLC	

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Leest does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Leest does not receive any additional compensation.

ITEM 6 SUPERVISION

Mr. Leest 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.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 10, 2021

JACOB BILIACK

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: jbiliack@wtwealthmanagement.com

Address: 809 W Riordan Rd., Suite 206

Flagstaff, AZ 86001

This brochure supplement provides information about Jacob Biliack, 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. Biliack's CRD number is 6581939.

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 **Jacob Biliack**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6581939

Year of Birth: 1992

Educational Background

Northern Arizona University	(2015)
Earned BA	

Business Experience

Investment Adviser Representative	Jan. 2018 – Present
WT Wealth Management, LLC	

Investment Adviser Representative	Jul. 2017 – Dec. 2017
Four Peaks Wealth Management, LLC	

Investment Adviser Representative	Apr. 2016 – May 2017
AXA Advisors LLC	

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Biliack is involved in the following other business activities for which he is compensated:

- Provides support for WT Tax Accounting, and
- Operates a vacation rental management business.

Mr. Biliack spends approximately 90% of his time on these other business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Biliack receives hourly compensation for his work with WT Tax Accounting and a salary for managing vacation rentals.

ITEM 6 SUPERVISION

Mr. Biliack 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.



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 10, 2021

JACKSON ROGERS

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: jrogers@westerntrust.com

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

This brochure supplement provides information about Jackson Rogers, 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. Rogers's CRD number is 7169007.

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 **Jackson Rogers**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 7169007

Year of Birth: 1994

Educational Background

Arizona State University **(2017)**

MBA in Economics

McGill University **(2015)**

BS Degree in Finance from the Desautels Faculty of Management

Business Experience

Investment Adviser Representative **Sep. 2019 – Present**

WT Wealth Management, LLC

Student **Aug. 2015 – Dec. 2017**

Arizona State University

Intern / Equity Analyst **Jun. 2015 – Dec. 2016**

WT Wealth Management, LLC

Student **Aug. 2013 – May 2015**

McGill University

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Rogers does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Rogers receives no additional compensation.

ITEM 6 SUPERVISION

Mr. Rogers 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.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 10, 2021**

BRENT RANKIN

BUSINESS PROCESS ANALYST

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: brankin@wtwealthmanagement.com

Address: 809 W. Riordan Rd, #206
Flagstaff AZ, 86001

This brochure supplement provides information about Brent Rankin, Business Process Analyst 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. The site is searchable by a unique identifying number known as a CRD number. Brent Rankin’s CRD number is 6482037.

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 **Brent Rankin**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6482037

Year of Birth: 1984

Educational Background

Western Governors University (2018 - 2020)

BS in Business Management

Business Experience

Business Process Analyst (Aug. 2020 - Present)

WT Wealth Management, LLC

Licensed Banker (Jun. 2020- Aug. 2020)

JP Morgan Securities

Private Client Banker (Mar. 2020 – Aug. 2020)

JP Morgan Chase Bank

Registered Representative (Apr. 2015 – Jun. 2019)

Charles Schwab & Co., Inc.

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Mr. Rankin does not engage in any outside business activities.

ITEM 5 ADDITIONAL COMPENSATION

Brent Rankin does not receive any additional compensation.

ITEM 6 SUPERVISION

Brent Rankin is the Business Process Analyst 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 for more information about this Brochure Supplement.



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
JULY 8, 2020**

KEVAN SCOTT PHILLIPS

SENIOR INVESTMENT ADVISOR

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

This brochure supplement provides information about Kevan Scott Phillips, 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. Scott Phillip's CRD number is 4382203.

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 thirteen (13) investment adviser representatives employed by WTWM. This Brochure Supplement provides information about **Scott Phillips**.

ITEM 2 EDUCATION AND BUSINESS EXPERIENCE

CRD No. 4382203

Year of Birth: 1958

Educational Background

Brigham Young University – J. Reuben Clark Law School (1983-1986)

J.D. Degree

Brigham Young University (1977-1982)

BA in Accounting with Minor in English

Business Experience

Northwestern Mutual Life (2002-2020)

Wealth Management Advisor

Harris, Carter & Phillips (1987-2000)

Attorney at Law

New York Football Giants (1982-1983)

ITEM 3 DISCIPLINARY INFORMATION

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

ITEM 4 OTHER BUSINESS ACTIVITIES

Scott Phillips maintains his insurance licenses and sells policies from time to time in the BOLI (Bank Owned Life Insurance) market and in the Credit Union markets. He also sells in the personal and business market. He spends approximately 10 hours a month in these insurance markets.

ITEM 5 ADDITIONAL COMPENSATION

Scott Phillips earns commissions for his work in insurance.

ITEM 6 SUPERVISION

Scott Phillips 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.