



WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 10, 2021

**ALLEN ATKINS, PH.D.**

CHIEF MARKET STRATEGIST,  
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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](http://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

<b>Assistant Professor of Finance</b> University of Arizona	<b>Aug. 1988 – Mar. 2007</b>
<b>Associate Director, Karl Eller Center</b> Berger Entrepreneurship Program, University of Arizona	<b>Jul. 1995 – Jul. 1998</b>
<b>Visiting Senior Lecturer in Finance</b> University of Auckland (Auckland, New Zealand)	<b>May 1993 – Aug. 1993</b>
<b>Assistant Instructor of Finance</b> University of Texas	<b>Jan. 1980 – May 1984</b>
<b>Assistant Instructor of Management and Marketing</b> Stephen F. Austin State University	<b>Jan. 1983 – May 1983</b>
<b>Income Tax Consultant</b> Barnett's Tax Service	<b>Jan. 1978 – May 1979</b>

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