



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

**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. WT Tax Accounting, LLC does not have a signatory authority for any client of WTWM's or for WTWM itself as an entity.

John Heilner is a licensed insurance agent, though is not affiliated with any particular agency or actively pursuing insurance business. He spends less than two hours per month maintaining his licenses. John Heilner may receive customary commissions resulting from insurance sales. John Heilner therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, John Heilner, as a fiduciary, will only recommend insurance products when he believes it to be in the client's best interest. Furthermore, clients are under no obligation to utilize John Heilner to purchase insurance products.

### **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.



# WEALTHMANAGEMENT

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**ROBERT F. REDWANC**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: [redwanc@wtwealthmanagement.com](mailto: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.

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. Robert F. Redwanc’s CRD number is 4354455.

## **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 **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:*

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

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



# WEALTHMANAGEMENT

FORM ADV PART 2B  
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**EILEEN M. PROUD**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (800) 825-0616

Email: [eproud@wtwealthmanagement.com](mailto: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](http://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

<b>Kaplan University</b>	<b>(2017)</b>
Wealth Management Specialist	
<b>Academy of Certified Financial Divorce Specialists</b>	<b>(2016)</b>
Earned CFDS designation	
<i>*CFDS license is no longer active.*</i>	
<b>Institute of Certified Divorce Financial Analysts</b>	<b>(2016)</b>
Earned CDFA designation	
<i>*CFDA license is no longer active.*</i>	
<b>College of Financial Planning</b>	<b>(1984 – 2004)</b>
Earned CFP designation	
<i>*CFP license is no longer active.*</i>	

### Business Experience

<b>Investment Advisor Representative</b>	<b>Dec. 2015 – Present</b>
WT Wealth Management, LLC	
<b>Member, Owner, President</b>	<b>May 2006 – Present</b>
True Financial Wealth Management Firm, LLC fka True Financial Advisory Firm, LLC	



**Investment Adviser Representative** **May 2006 – Nov. 2020**  
True Financial Wealth Management Firm, LLC  
fka True Financial Advisory Firm, LLC

**Registered Representative, Investment Advisor  
Representative, Shareholder** **Jan. 2008 – Apr. 2013**  
Financial Advisors of America, LLC

**Registered Representative, Investment Advisor  
Representative** **Sept. 2002 – Jan. 2008**  
Girard Securities, Inc.

**Registered Representative, Investment Advisor  
Representative** **Jul. 1985 – Sept. 2002**  
Sentra Securities Corporation

### **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 Proud has not outside business activities to report.

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



# WEALTHMANAGEMENT

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**ALLEN ATKINS, PH.D.**

Senior Investment Advisor

Phone: (928) 225-2474

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Address: 813 N Beaver St

Flagstaff, AZ 85257

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

**Senior Investment Advisor** Jan. 2022 – Present  
WT Wealth Management, LLC

**Chief Marketing Strategist** Jan. 2018 – Jan. 2022  
WT Wealth Management, LLC

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

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

**Associate Professor of Finance** Aug. 1998 – Apr. 2007  
Northern Arizona University

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

<b>Member</b> Four Peaks Wealth Sedona, LLC	<b>Feb. 2017 – Nov. 2017</b>
<b>Assistant Professor of Finance</b> University of Arizona	<b>Aug. 1988 – Aug. 1998</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 does not have any outside business activities to report.

### **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.



# WEALTHMANAGEMENT

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**MATTHEW HAERTZEN, CFA**

SENIOR INVESTMENT ADVISOR

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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

Address: 813 N Beaver St

Flagstaff, AZ 85257

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](http://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

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



### **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 Senior 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 two organizations: Tucson CFA Society and Marana Health Care Benefits Trust. He also serves on the Investment Committee for the Community Foundation for Southern Arizona. 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 Senior 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](mailto:djohnson@wtwealthmanagement.com) for more information about this Brochure Supplement.



# WEALTHMANAGEMENT

FORM ADV PART 2B  
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**RYAN STUART, CFA**

Business Director

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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

Address: 813 N Beaver St

Flagstaff, AZ 85257

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

**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 also serves on the Board of Directors as the Treasurer for The Arboretum at Flagstaff. He spends approximately 6 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. 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.



# WEALTHMANAGEMENT

FORM ADV PART 2B  
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**EMY TICE, CFP**

CERTIFIED FINANCIAL PLANNER

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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Address: 813 N Beaver St

Flagstaff, AZ 85257

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.

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

**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** Jan. 2003 – Aug. 2011  
Boyer Heating and Cooling

**Business Manager** Mar. 1995 – Jan. 2003  
Boyer Heating and Cooling

**Part-Time Instructor of Business** Jan. 1995 to May 2011  
Northern Arizona University, W.A. Franke College of Business

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





# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

**GLENN LEEST**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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

Address: 813 N Beaver St

Flagstaff, AZ 85257

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.

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. Leest’s CRD number is 6234623.

## 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 is a licensed insurance agent, though is not affiliated with any particular agency or actively pursuing insurance business. He spends less than two hours per month maintaining his licenses. Mr. Leest may receive customary commissions resulting from insurance sales. Mr. Leest therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, Mr. Leest, as a fiduciary, will only recommend insurance products when he believes it to be in the client's best interest.

Furthermore, clients are under no obligation to utilize Mr. Leest to purchase insurance products.

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



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

**JACOB BILIACK**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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

Address: 813 N Beaver St

Flagstaff, AZ 85257

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](http://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:

- Operates a vacation rental management business.

Mr. Biliack spends approximately 10% of his time on this outside business activity.

Mr. Biliack is a licensed insurance agent, though is not affiliated with any particular agency or actively pursuing insurance business. He spends less than two hours per month maintaining his licenses. Mr. Biliack may receive customary commissions resulting from insurance sales. Mr. Biliack therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, Mr. Biliack, as a fiduciary, will only recommend insurance products when he believes it to be in the client's best interest. Furthermore, clients are under no obligation to utilize Mr. Biliack to purchase insurance products.

## **ITEM 5      ADDITIONAL COMPENSATION**

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



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

## **JACKSON ROGERS**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

Email: [jrogers@westerntrust.com](mailto: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](http://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](mailto:djohnson@wtwealthmanagement.com) for more information about this Brochure Supplement.



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

## **BRENT RANKIN**

Investment Model & Strategy Analyst

Phone: (928) 225-2474

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

Address: 809 W. Riordan Rd, #206  
Flagstaff AZ, 85257

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](http://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

**Investment Model & Strategy 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**

Brett Rankin does not have any outside business activities to report.

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



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
March 25, 2022

**KEVAN SCOTT PHILLIPS**

SENIOR INVESTMENT ADVISOR

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 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](http://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. Scott Phillips may receive customary commissions resulting from insurance sales. Scott Phillips therefore has an incentive to recommend insurance products based on the compensation to be earned. To mitigate this conflict, Scott Phillips, as a fiduciary, will only recommend insurance products when he believes it to be in the client's best interest. Furthermore, clients are under no obligation to utilize Scott Phillips to purchase insurance products.

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



WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
May 10, 2022

**AUSTIN ROGERS**

INVESTMENT ADVISOR REPRESENTATIVE

Phone: (928) 225-2474

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

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

This brochure supplement provides information about Austin 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](http://www.adviserinfo.sec.gov). The site is searchable by a unique identifying number known as a CRD number. Austin Rogers’s CRD number is 7518550.



## **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 **Austin Rogers**.

## **ITEM 2 EDUCATION AND BUSINESS EXPERIENCE**

CRD No. 7518550

Year of Birth: 1998

### Educational Background

**The University of Tennessee at Martin** (2020)  
Earned BS in Accounting & Finance

### Business Experience

**Investment Adviser Representative** May 2022 – Present  
WT Wealth Management, LLC

**Accounting & Compliance Administrator** Mar. 2021 – Present  
WT Wealth Management, LLC

## **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 is not involved in other business activities for which he is compensated.

## **ITEM 5 ADDITIONAL COMPENSATION**

Mr. Rogers does not receive any economic benefit from any third party for providing advisory services.

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