



# WEALTHMANAGEMENT

FORM ADV PART 2B  
BROCHURE SUPPLEMENT  
MARCH 25, 2022

**JACOB BILIACK**

INVESTMENT ADVISOR REPRESENTATIVE

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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.