



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 25, 2022

JOHN HEILNER

CHIEF INVESTMENT OFFICER

INVESTMENT ADVISOR REPRESENTATIVE

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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. 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 for more information about this Brochure Supplement.