



WEALTHMANAGEMENT

FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 31, 2023

JACOB BILIACK

INVESTMENT ADVISOR REPRESENTATIVE

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This brochure supplement provides information about Jacob Biliack, Investment Advisor 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 2: EDUCATION AND BUSINESS EXPERIENCE

CRD No. 6581939
Year of Birth: 1992

Educational Background

Northern Arizona University (2015)
BA

Business Experience

WT Wealth Management, LLC (Jan. 2018 - Present)
Investment Advisor Representative

Madison Fire Department (Jan. 2018 - Sept. 2019)
Firefighter

Ponderosa Fire District (Sep. 2013 - Oct. 2017)
Reserve Firefighter

Four Peaks Wealth Management, LLC (Jul. 2017 - Dec. 2017)
Investment Advisor Representative

AXA Advisors, LLC (Apr. 2016 - May 2017)
Investment Advisor Representative

Highlands Fire District (Apr. 2015 - Sept. 2017)
Firefighter

Professional Designations

CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates must complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board’s code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mr. Biliack. Mr. Biliack has never been involved in any investment related regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Biliack.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Biliack.**

However, we do encourage you to independently view the background of Mr. Biliack on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 6581939.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Biliack owns rental property which he advertises and rents through Airbnb. Clients are not required to engage Mr. Biliack for rental services offered for property owned. This is a non-investment related activity and Mr. Biliack spends approximately 10% of his time on this outside business activity.

Mr. Biliack is a licensed insurance agent. He 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 does not receive any economic benefit from any person, company or organization, in exchange for providing clients advisory services through WT Wealth Management. However, Mr. Biliack may receive additional compensation for fixed insurance products sold as an insurance agent.

ITEM 6: SUPERVISION

Mr. Biliack is an Investment Advisor 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.