



WEALTHMANAGEMENT

**FORM ADV PART 2B
BROCHURE SUPPLEMENT
MARCH 31, 2023**

RYAN STUART, CFA

BUSINESS DIRECTOR

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Supervised From:

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Located At:

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This brochure supplement provides information about Ryan Stuart, Business Director 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. Stuart’s CRD number is 6639504.

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

Bachelor's Degree in Business Administration,

with emphasis in Finance, and Quantitative Finance Certificate

Business Experience

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

Business Director

Four Peaks Wealth Management, LLC (Apr. 2016 - Mar. 2018)

Director of Private Equity Investments/Member

Four Peaks Wealth Management & Accounting, LLC (Jan. 2017 - Nov. 2017)

Director

KPMG Australia (Oct. 2015- Dec. 2015)

Manager

KPMG, LLP (Jan. 2014- Dec. 2015)

Senior Consultant

Professional Designations

CHARTERED FINACIAL ANALYST (CFA)

Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. In order to qualify, one must hold a bachelor's degree from an accredited institution or have equivalent education or work experience, have successful completion of all three exam levels of the CFA Program, and have 48 months of acceptable professional work experience in the investment decision making process. Furthermore, they must 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. Chartered Financial Analysts must agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

ITEM 3: DISCIPLINARY INFORMATION

There are no legal, civil, or disciplinary events to disclose regarding Mr. Stuart. Mr. Stuart 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. Stuart.

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. Stuart.**

However, we do encourage you to independently view the background of Mr. Stuart on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 6639504.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Stuart provides business and investment valuation consulting services for parent company Western Trust and clients of affiliate WT Tax Accounting. Clients are not required to engage Mr. Stuart for services provided under these affiliates and can seek similar services elsewhere. Mr. Stuart spends 10-20 hours per year on these activities.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Stuart does not receive any economic benefit from any person, company or organization, in exchange for providing clients advisory services through WT Wealth Management. Mr. Stuart receives compensation for his consulting services with Western Trust and WT Tax Accounting.

ITEM 6: SUPERVISION

Mr. Stuart is a Business Director 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.