

CUSTODIAN DIRECTORY

(for clients only)



WEALTHMANAGEMENT
REGISTERED INVESTMENT ADVISOR

MAIN OFFICE AND MAILING ADDRESS:

7161 E Rancho Vista Drive, Suite 112
Scottsdale, AZ 85251
Phone: 800-825-0616
Fax # 480-219-3613
www.wtwealthmanagement.com

John Heilner, Chief Investment Officer: jheilner@wtwealthmanagement.com
Eileen Proud, Investment Advisor Representative: eproud@wtwealthmanagement.com
Robert Redwanc, Investment Advisor Representative: redwanc@wtwealthmanagement.com
Christie Gutierrez, Administrative Assistant: cgutierrez@wtwealthmanagement.com

DEPOSIT & WIRE INSTRUCTIONS

Make check payable to TD Ameritrade Clearing FBO

**Always include your name and account number

** For Retirement Accounts: include name, account number and year of contribution

MAIL CHECK (VIA USPS)

TO Ameritrade Institutional
PO Box 650567
Dallas, TX 75265-0567

OVERNIGHT MAILING (VIA UPS OR FEDEX)

TD Ameritrade Institutional
7801 Mesquite Bend Drive, Suite 112
Irving, TX 75063-6043

BANK WIRE INSTRUCTIONS:

Wells Fargo Bank NA
5010 Wateridge Vista Drive
420 Montgomery Street
San Francisco, CA 94104
Account: TD Ameritrade Inc.
Routing # 121000248
Account # 4123214561

F/B/O Name of Investor and TD Ameritrade Acct # _____

Reference contact: WT WEALTH MANAGEMENT # 800-825-0616