

*This brochure supplement provides information about Mark Philip Whitaker that supplements the Peterson Wealth Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Mark Philip Whitaker if you did not receive Peterson Wealth Advisors, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Mark Philip Whitaker is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Peterson Wealth Advisors, LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Mark Philip Whitaker**

Personal CRD Number: 6407468

Investment Adviser Representative

Peterson Wealth Advisors, LLC  
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OREM, UT 84057  
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UPDATED: 01/21/2016

## Item 2: Educational Background and Business Experience

**Name:** Mark Philip Whitaker **Born:** 1989

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelors of Science in Personal Financial Planning – Utah Valley University - 2015

#### **Business Background:**

11/2015 - Present	Investment Adviser Representative Peterson Wealth Advisors, LLC
02/2010 – 12/2015	Student Utah Valley University
02/2013 – 10/2015	Administrative Assistant Diversify Inc.
12/2013 - 11/2015	Associate Financial Advisor DFPG Investments
01/2008 - 01/2010	Missionary Church of Jesus Christ of Latter day Saints
06/2007 - Present	Squad Leader Utah Army National Guard
01/2005 - 12/2007	Student Pleasant Grove High School

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

Mark Philip Whitaker is a soldier in the Utah Army National Guard. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Peterson Wealth Advisors, LLC always acts in the best interest of the client and clients are in no way required to utilize the services of any representative of Peterson Wealth Advisors, LLC in such individual's outside capacities.

#### **Item 5: Additional Compensation**

Mark Philip Whitaker does not receive any economic benefit from any person, company, or organization, other than Peterson Wealth Advisors, LLC in exchange for providing clients advisory services through Peterson Wealth Advisors, LLC.

#### **Item 6: Supervision**

As a representative of Peterson Wealth Advisors, LLC, Mark Philip Whitaker is supervised by Scott M Peterson, the firm's Chief Compliance officer. Scott M Peterson is responsible for ensuring that Mark Philip Whitaker adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Scott Peterson is (801) 225-0000.

