



Item 1 Cover Page for Brochure Supplement

Daniel F. DiLascia, Jr., Owner / Member

Base Wealth Management  
7241 Delainey Court  
Lakewood Ranch, FL 34240  
(727) 421-1685

October 1, 2022

This brochure supplement provides information about Daniel F. DiLascia, Jr. that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Daniel F. DiLascia, Jr. if you did not receive Base Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel F. DiLascia, Jr. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

Daniel F. DiLascia, Jr., CLU, Owner / Member, was born in 1976. Mr. DiLascia earned a Bachelor of Science degree in Finance from Siena College.

Mr. DiLascia formed Base Wealth Management in May 2022 and it became a Registered Investment Advisor in October 2022. In addition to his role at Base Wealth Management since October 2022, Mr. DiLascia is President of DICORB Holdings, Inc. since January 2014. Previously, Mr. DiLascia was a Registered Representative with Interwest International Equities Corporation from February 2004 to October 2022, and an Investment Advisor Representative with Interwest International, Inc. from July 2015 to October 2022.

A Chartered Life Underwriter (CLU) is a professional designation for individuals who wish to specialize in life insurance and estate planning. Individuals must complete five core courses and three elective courses, and successfully pass all eight two-hour, 100-question examinations in order to receive the designation. CLUs are required to complete 30 hours of continuing education every two years.

## Item 3 Disciplinary Information

There are no legal or disciplinary events or proceedings to report concerning Mr. DiLascia.

## Item 4 Other Business Activities

Mr. DiLascia is President and part owner of DICORB Holdings, Inc. d/b/a Base Commercial Real Estate, an entity that rents commercial real estate.

Mr. DiLascia is also licensed and registered as an insurance agent to sell life, accident and other lines of insurance for various insurance companies, which activity is conducted through unaffiliated third-party insurance agencies. Therefore, he will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of such products. This creates a conflict of interest because of the receipt of additional compensation by Mr. DiLascia. Clients are not obligated to use Mr. DiLascia for insurance products services. However, in such instances, there is no Base Wealth management fee associated with commission-based insurance products, and clients will be made aware of all commissions associated with the products prior to the transactions.

Mr. DiLascia's outside business activities do not constitute more than 10% of his time or income.

## Item 5 Additional Compensation

Mr. DiLascia does not receive compensation or other economic benefit from anyone who is not a client for providing advisory services to Base Wealth clients.



## Item 6 Supervision

Daniel F. DiLascia, Chief Compliance Officer, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of the Base Wealth Management supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Daniel F. DiLascia can be reached at (727) 421-1685.



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Sean M. Koscho, Investment Advisor Representative

Base Wealth Management  
7241 Delainey Court  
Lakewood Ranch, FL 34240  
(941) 323-4247

October 1, 2022

This brochure supplement provides information about Sean M. Koscho that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Sean M. Koscho if you did not receive Base Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Sean M. Koscho is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## **Item 2 Educational Background and Business Experience**

Sean M. Koscho, Investment Advisor Representative, was born in 1969. Mr. Koscho earned an AB degree in Economics from Harvard University.

In addition to his role at Base Wealth Management since October 2022, Mr. Koscho serves as a Firefighter/EMT for the Sarasota County Fire Department since May 2014.

Previously, Mr. Koscho was a Registered Representative with Interwest International Equities Corporation from January 2021 to October 2022, an Investment Advisor Representative at Interwest International, Inc. from June 2021 to October 2022, a Registered Representative with PFS Investments Inc. from September 2020 to January 2021, an Agent for Primerica Financial Services from March 2020 to January 2021, and the Football Coach at Cardinal Mooney High School from August 2010 to November 2019.

## **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Koscho.

## **Item 4 Other Business Activities**

Mr. Koscho is licensed and registered as an insurance agent to sell life, accident and other lines of insurance for various insurance companies, which activity is conducted through unaffiliated third-party insurance agencies. Therefore, he will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of such products. This creates a conflict of interest because of the receipt of additional compensation by Mr. Koscho. Clients are not obligated to use Mr. Koscho for insurance products services. However, in such instances, there is no Base Wealth management fee associated with commission-based insurance products, and clients will be made aware of all commissions associated with the products prior to the transactions.

Mr. Koscho is also a Firefighter/EMT for the Sarasota County Fire Department.

Mr. Koscho spends approximately 50% of his time on these outside activities.

## **Item 5 Additional Compensation**

Mr. Koscho does not receive compensation or other economic benefit from anyone who is not a client for providing advisory services to Base Wealth clients.



## Item 6 Supervision

Daniel F. DiLascia, Chief Compliance Officer, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of the Base Wealth Management supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Daniel F. DiLascia can be reached at (727) 421-1685.