



Daniel F. DiLascia, Jr.

Base Wealth Management  
7301 Merchant Court, Suite A  
Lakewood Ranch, FL 34240  
(941) 203-6040

January 8, 2024

**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., 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 Intervest International Equities Corporation from February 2004 to October 2022, and an Investment Advisor Representative with Intervest International, Inc. from July 2015 to October 2022.

## **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, whose 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 obliged to use Mr. DiLascia for insurance products and 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 before 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 benefits 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 (941) 203-6040.



Sean M. Koscho, Investment Advisor Representative

Base Wealth Management  
7301 Merchant Court, Suite A  
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(941) 263-3193

January 8, 2024

**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 has served as a Firefighter/EMT for the Sarasota County Fire Department since May 2014.

Previously, Mr. Koscho was a Registered Representative with Interinvest International Equities Corporation from January 2021 to October 2022, an Investment Advisor Representative at Interinvest 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, whose 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 or 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 before 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 (941) 203-6040.



Kyle A. Howell

Base Wealth Management  
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(813) 995-8338

January 8, 2024

**This brochure supplement provides information about Kyle A. Howell that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Kyle A. Howell 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 Kyle A. Howell is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



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

Kyle A. Howell, Financial Advisor, was born in 1979. Mr. Howell earned a Bachelor of Arts degree in Economics from the University of South Florida.

In addition to his role as a Financial Advisor at Base Wealth Management since July 2023, Mr. Howell has held a license for insurance sales since 2014.

Previously, Mr. Howell was an Investment Advisor Representative and Registered Representative with Calton & Associates, Inc. from April 2019 to July 2023, a Registered Representative with Royal Alliance Associates, Inc. from November 2018 to April 2019, and a Registered Representative with SII from October 2015 to November 2018.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Howell is licensed and registered as an insurance agent to sell life, accident, and other lines of insurance for various insurance companies, whose 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. Howell. Clients are not obligated to use Mr. Howell for insurance products or 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 before the transactions.

Mr. Howell spends approximately 25% of his time on these outside activities.

## **Item 5 Additional Compensation**

Mr. Howell 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 (941) 203-6040.



Alexander C. Wolfe

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(941) 343-9040

January 8, 2024

**This brochure supplement provides information about Alexander C. Wolfe that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Alexander C. Wolfe 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 Alexander C. Wolfe is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



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

Alexander C. Wolfe, Head of Financial Planning, was born in 1992. Mr. Wolfe earned a Bachelor of Arts degree in Economics from Texas A&M University.

Prior to joining Base Wealth Management in August 2023, Mr. Wolfe was an Associate Planner with FourThought Financial Partners, LLC from November 2022 to July 2023, an Associate Planner with FourThought Financial LLC from October 2021 to July 2023, and a Financial Representative with Fidelity Brokerage Services, LLC from January 2015 to October 2021.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Wolfe is not actively engaged in any investment-related or non-investment-related business or occupation outside of Base Wealth.

## **Item 5 Additional Compensation**

Mr. Wolfe 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 (941) 203-6040.





Joshua M. Pisa, CPA

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(941) 867-6771

January 8, 2024

**This brochure supplement provides information about Joshua M. Pisa that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Joshua M. Pisa 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 Alexander C. Wolfe is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



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

Joshua M. Pisa, CPA, Wealth Advisor, was born in 1982. Mr. Pisa earned a Bachelor of Science degree in Finance from the University of Tampa.

In addition to his role as a Financial Advisor at Base Wealth Management since January 2024, Mr. Pisa is the President/Owner of Strategic Tax Advisory LLC d/b/a Base Tax LLC since 2019.

Previously, Mr. Pisa was Director of Wealth Management with Walters Strategic Advisors, LLC from July 2020 to December 2023, Tax Director with Walters & Associates CPAs from July 2020 to December 2023, Tax Director with Doyle Wealth Management, Inc. from January 2018 to July 2020, and Tax Manager with Ernst & Young, LLP from May 2013 to December 2017.

Certified Public Accountants, or CPAs, are the only licensed accounting professionals in the United States. CPA licenses are issued by each of the state boards of accountancy.

Earning the designation as a CPA requires a combination of educational experience, including 150 semester hours of college education that contains a balance of accounting, business, and general education courses; meeting state-determined minimum work experience requirements; and passing an examination consisting of four, four-hour sections, to demonstrate competence in the technical subject matter covering: auditing and attestation; business environment and concepts; financial accounting and reporting; and regulation. CPAs maintain their designation by taking 40 hours of continuing professional education annually.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Pisa is the Owner and President of Strategic Tax Advisory, a CPA firm that provides tax and accounting services to small businesses and individuals. Mr. Pisa spends approximately 65% of his time on this outside activity.

Mr. Pisa is not actively engaged in any investment-related business or occupation outside of Base Wealth.

## **Item 5 Additional Compensation**

Mr. Pisa 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**

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