



Daniel F. DiLascia, Jr., Owner / Member

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

March 24 , 2026

**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, the majority owner of Base O'Lakes LLC since November 2023, the owner of Base Insurance, LLC since December 2023, and an owner of DICORB TWO LLLP since February 2024. 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 the President and owner of Base Commercial Real Estate and Base Insurance LLC. In addition to these roles, Mr. DiLascia holds ownership interests in several affiliated entities. He is the majority owner of Base O'Lakes LLC and Turtle Shell Company AMI. Mr. DiLascia is also a one-third owner of DICORB Holdings Inc., DICORB Two LLLP, and Land Dan Properties. Additionally, he holds a 50% ownership interest in The BOWCIA Group, Porter Flex LLC, and Base Wealth Park Street.

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 an affiliated agency, Base Insurance LLC, and 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 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 prior to the transactions.

Mr. DiLascia's outside business activities do not constitute more than 20% 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 (941) 203-6040.



Kyle A. Howell, Investment Advisor Representative

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

January 30, 2026

**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 part owner of Base O'Lakes, LLC and Turtle Shell Company AMI LLC, both companies are entities that rent real estate. 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 an affiliated agency, Base Insurance, LLC, and 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 prior to 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.



Jeremy C. Riggs, CFP<sup>®</sup>, Financial Advisor

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

April 13, 2026

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



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

Jeremy C. Riggs, CFP®, Financial Advisor, was born in 1985. Mr. Riggs earned a Bachelor of Science degree in Business Administration & Finance from Columbia Southern University.

Prior to joining Base Wealth Management in July 2024, Mr. Riggs was a Financial Representative with Fidelity Brokerage Services, LLC from December 2016 to June 2024.

Mr. Riggs is certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and the CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met the CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas the CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.



Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with the CFP Board’s Code and Standards. This includes a commitment to the CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but the CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

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

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

Mr. Riggs is the Owner of Centerpoint Industries, a rental property management company. This outside activity is not material to Mr. Riggs’ time or compensation.

In addition to his role as an investment adviser representative with Base Wealth Management, Mr. Riggs has an ownership interest in Boardwalk Trust Co., a separate company that assists clients with estate planning services through independent, third-party attorneys. If you choose to engage Boardwalk for estate planning services, Mr. Riggs may receive additional compensation in his capacity as an owner of that company. Clients are not required to use Boardwalk and are free to work with any estate planning attorney of their choice. If you do decide to work with Boardwalk, you will be provided with full details regarding the services offered, fees, and the nature of the arrangement

Mr. Riggs is also a part-owner of Turtle Shell Company AMI LLC and Base Wealth Park Street LLC. Both entities are engaged in the ownership and leasing of commercial real estate.

Mr. Riggs 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 an affiliated agency, Base Insurance, LLC, and 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. Riggs. Clients are not obligated to use Mr. Riggs 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 prior to the transactions.

Mr. Riggs’ priority remains to ensure that you receive financial and estate planning solutions that best meet your needs, whether through affiliated entities or through providers you select independently.

These other business activities do not constitute a material amount of Mr. Riggs’ time or income.

### **Item 5 Additional Compensation**

Mr. Riggs does not receive compensation or other economic benefit from anyone who is not a client for 7301 Merchant Court, Lakewood Ranch, FL 34240



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, CFP<sup>®</sup>, Head of Financial Planning

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

June 16, 2025

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.

Mr. Wolfe is certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met the CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas the CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.



Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with the CFP Board’s Code and Standards. This includes a commitment to the CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. The CFP Board may sanction a CFP® professional who does not abide by this commitment,

but the CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **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**

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Joshua M. Pisa, CPA, Wealth Advisor

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

June 16, 2025

**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 Joshua M. Pisa 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 Partner 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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Alexander M. Chandler, CFP<sup>®</sup>, Financial Advisor

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

June 16, 2025

**This brochure supplement provides information about Alexander M. Chandler that supplements the Base Wealth Management brochure. You should have received a copy of that brochure. Please contact Alexander M. Chandler 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 M. Chandler 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 M. Chandler, CFP®, Financial Advisor, was born in 1985. Mr. Chandler earned a Bachelor of Arts degree in Political Science from North Carolina State University.

Prior to joining Base Wealth Management in June 2025, Mr. Chandler was a Financial Advisor with Heritage Financial Advisory from October 2024 to March 2025, a Financial Advisor with Fleishel Financial Associates from May 2023 to October 2024, and an Investment Management Consultant II with Fidelity Investments from October 2007 to April 2023.

Mr. Chandler is certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met the CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas the CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.



Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with the CFP Board’s Code and Standards. This includes a commitment to the CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. The CFP Board may sanction a CFP® professional who does not abide by this commitment, but the CFP Board does not guarantee a CFP® professional’s service. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

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

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

Mr. Chandler 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 an affiliated agency, Base Insurance LLC, and 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. Chandler. Clients are not obligated to use Mr. Chandler 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.

### **Item 5 Additional Compensation**

Mr. Chandler 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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Joseph Stoy, Wealth Advisor

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

January 26 , 2025

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



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

Joseph Stoy, Wealth Advisor, was born in the year 2000. Mr. Stoy earned a Bachelor of Business Administration with a concentration in Accounting from Stetson University in DeLand, Florida.

Since January 2025, Mr. Stoy has been employed as a Wealth Advisor with Base Wealth Management. In addition, he is employed as a Senior Tax Accountant with Strategic Tax Advisory LLC, doing business as Base Tax, LLC.

Previously, Mr. Stoy was employed as a Financial Planning Specialist with North South Wealth Management in Sarasota, Florida, from May 2025 through November 2025.

From May 2025 through November 2025, Mr. Stoy was employed as a Tax Manager with The Purser Group in Sarasota, Florida.

From October 2024 through November 2025, Mr. Stoy was also employed as a Senior Financial Auditor with Assurance Dimensions in Tampa, Florida

Mr. Stoy's role as A senior Tax Accountant does not impair his ability to meet his obligations to advisory clients.

Mr. Stoy spends 70% of his time in the tax management business and 30% on Investment Advisory business

Mr. Stoy is currently studying for the Certified Public Accountant (CPA) examination.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Stoy is employed as a Senior Accountant at Base Tax, a CPA firm that provides tax and accounting service to small business and individuals. Mr. Stoy spends approximately 70% of his time on this outside business activity.

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

## **Item 5 Additional Compensation**

Mr. Stoy 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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James Tucci, Financial Advisor

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

February 5, 2026

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



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

James Tucci, Financial Advisor, was born in 1998.

Mr. Tucci earned a Bachelor of Business Administration from Kent State University in 2021.

Prior to joining Base Wealth Management in February 2026, Mr. Tucci was employed as a Financial Advisor at Sterling Bridge Financial Group from October 2021 through December 2025. From June 2021 through October 2021, Mr. Tucci worked as a Teller at Ficare Federal Credit Union.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Tucci 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 an affiliated agency, Base Insurance, LLC, and 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. Tucci. Clients are not obligated to use Mr. Tucci 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 prior to the transactions.

Mr. Tucci spends approximately 10 % of his time on this outside business activity.

## **Item 5 Additional Compensation**

Mr. Tucci 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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Brady Steward, Financial Advisor

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

March 3, 2026

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



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

Brady Steward, Financial Advisor, was born in 2004.

Mr. Steward is currently enrolled at Pasco-Hernando State College, where he is pursuing a degree in Business Administration with a concentration in Organizational Management and Communication. His anticipated graduation date is July 2026.

Mr. Steward joined Base Wealth Management in March 2026. Prior to joining the firm, he was employed as a Life Insurance Specialist at Base Insurance, LLC from July 2025 through February 2026. Previously, he served in an administrative support role at Base Wealth Management from May 2024 through July 2025.

## **Item 3 Disciplinary Information**

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

## **Item 4 Other Business Activities**

Mr. Steward 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 an affiliated agency, Base Insurance, LLC, and 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. Steward. Clients are not obligated to use Mr. Steward 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 prior to the transactions. Mr. Steward dedicates approximately 50% of his time to this outside business activity.

Mr. Steward is also the owner of Steward Financial Planning Services, LLC, which exists solely for tax purposes. His involvement with this entity is entirely passive; he does not perform any services or spend time managing it. This entity does not provide advisory services to clients and does not create any conflicts of interest with his duties at Base Wealth Management.

## **Item 5 Additional Compensation**

Mr. Steward 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.