BASE
Wealth Management

COMPANY PROFILE

WHO WE ARE

Base Wealth Management is a fee-based financial planning and wealth management firm with ofifce locations in Lakewood Ranch & Land O' Lakes, Florida. While we are proudly locally owned and operated, our services extend throughout Florida, with a strong presence also in the Jacksonville region. With over 33 years of collective experience in personal financial services, we dedicate ourselves to providing clients from all walks of life with a relationship that fosters growth, security, and independence.

www.basewealthmanagement.com

COMPANY OVERVIEW

About Us

Over the years, we've helped a diverse range of clients—from CEOs and executives to athletes, firefighters, and police officers—achieve their retirement goals. When done right, financial planning is about more than just money. It's about integrity and building relationships – and those things are free.

Base Wealth's principles are deeply rooted in empathy, kindness, authenticity, honesty, and performance. Our aim is to serve as an integral advocate and partner to help our clients lay out the very best financial path for themselves.

For those who are ready, we're here to help clear your path forward, and then walk with you every step of the way.

OUR VALUES

Mission

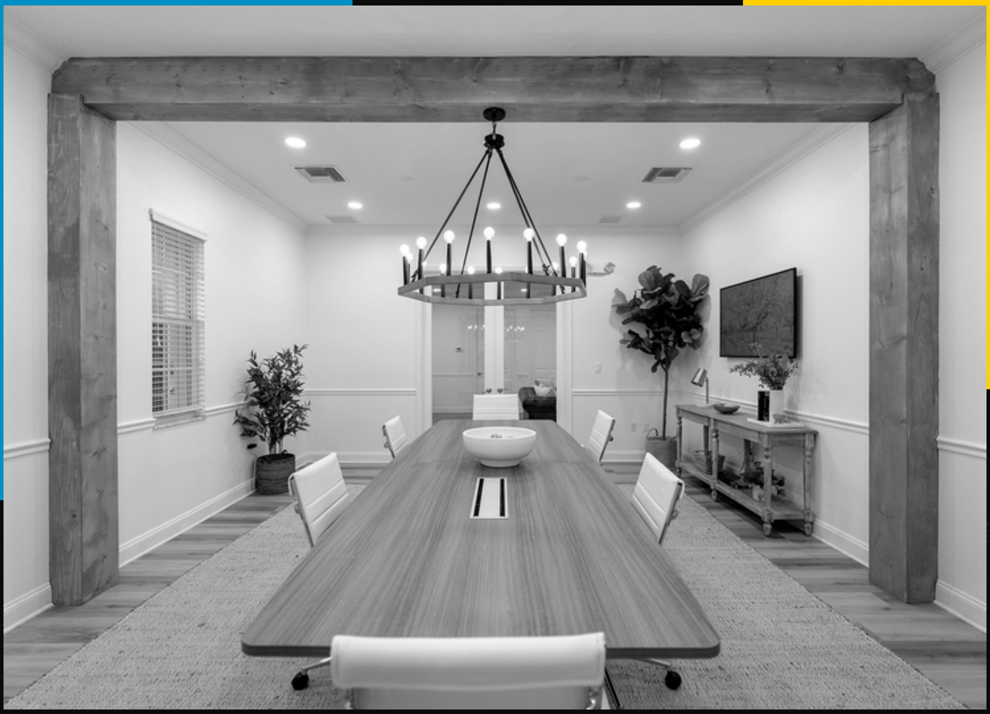
Our goal is to empower each of our clients with financial independence through customized, client-centric planning.

We go beyond mere advice; we build relationships based on trust, integrity, and a deep understanding of your unique financial landscape.

Vision

We envision a future where our clients, irrespective of their starting point, can achieve their financial dreams with confidence.

Whether it's building a retirement nest egg, investing in profitable ventures, or ensuring a legacy for the next generation, we want to be the catalyst that makes it happen.



WHAT WE DO

- **Goal Based Financial Planning** - From buying a home to securing your retirement, we align your overall financial plan with your life's ambitions.
- **Everything in One Place** - See all your investments, savings, documents, and debts at a glance to make informed decisions with everything in one place.
- **Tax Planning & Analysis** - We actively manage your tax brackets with tax-efficient investment strategies for optimal financial health.
- **Manage Your 401(K)** -We seamlessly integrate your 401(K) into your broader investment strategy with sophisticated software.
- **Risk Analysis** - We use sophisticated risk software to analyze your entire financial life to ensure your investments align with your risk profile.
- **Estate Planning** - Leverage strategic investment vehicles for tax-efficient wealth transfer, helping ensure your legacy thrives across generations.

OUR TEAM

At Base Wealth Management, we are *fiduciary* financial advisors and planners. Our job is to advise you on the best path for your money - we don't sell you anything.

Your interests are always above our own, even at a legal level. United by values like integrity and performance, we're here to guide you every step of the way on your financial journey!

Dan DiLascia
Principal

Sean Koscho
Financial Advisor

Kyle Howell
Financial Advisor

Josh Pisa
Wealth Advisor

Alex Wolfe, CFP®
Financial Planner

Nuala Leonard
Operations

Kathie
Adimistration

Christine Ward
Tax Manager

Suzy Wilbert
Onboarding

Dustin Taylor
Marketing

MORE INFORMATION

While we serve clients nationwide, our strongest presence is in Lakewood Ranch, Land O' Lakes, Tampa, Jacksonville, and other areas of Florida. By staying on top of the latest industry trends and technology, we can offer top-of-the-line customer service to help build your wealth faster. Feel free to reach out via any of the methods below!

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7301 Merchant Ct,
Lakewood Ranch, FL

BASE WEALTH MANAGEMENT is able to offer advisory services in all 50 states. Base Wealth Management renders individualized responses to persons in a particular state only after complying with the applicable SEC and state regulatory requirements, or pursuant to applicable exemptions or exclusions.

Different types of investments involve varying degrees of risk including the potential loss of the entire principal invested. Past performance is no guarantee of future results and there can be no assurance that any specific investment will be profitable. There are also no assurances that any portfolio will match or outperform a particular benchmark or index.

BASE WEALTH MANAGEMENT does not represent, warranty, or imply that the services or methods of analysis employed by the firm can or will successfully identify market tops or bottoms, or insulate clients from losses due to market corrections or declines.

BASE WEALTH MANAGEMENT will provide all prospective clients with a copy of our current (“Brochure” and “Brochure Supplement”) prior to commencing an Advisory relationship. Existing clients will receive a copy of these documents on an annual basis.

Click here for our latest Client Relationship Summary Document.

Click here for a list of full disclosures.

If you have any questions regarding Compliance and Regulatory information, please Contact Us.

https://adviserinfo.sec.gov