

**Part 2B of Form ADV: *Brochure Supplement***

Dana Dotoli

**Sagent|Wealth Management**

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This brochure supplement provides information about Dana Dotoli that supplements the Sagent Wealth Management brochure. You should have received a copy of that brochure. Please contact Iris Datzman if you did not receive Sagent Wealth Management's brochure or if you have any questions about the contents of this supplement.

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

**Item 1 Educational, Background and Business Experience**

**Full Legal Name:** Dana Dotoli

**Born:** 1967

### **Education**

- Penn State University; Bachelor of Arts, Political Science; 1989
- Keller Graduate School of Management; MBA, Finance; 2001
- Western State University College of Law; JD, Law; 2006

### **Business Experience**

- Sagent Wealth Management; Financial Advisor; from 05/2010 to Present
- UBS Financial Services, Inc.; Financial Advisor; from 03/2008 to 05/2010
- Sanford C. Bernstein; Financial Advisor; from 05/2006 to 03/2008
- Citi Group; Regional Sales Manager; from 01/2006 to 05/2006
- Technology Finance Partners; Consultant; from 2010 to Present

## **Item 2 Disciplinary Information**

Dana Dotoli has no reportable disciplinary history.

## **Item 3 Other Business Activities**

### **A. Investment-Related Activities**

1. Dana Dotoli is not engaged in any other investment-related activities.
2. Dana Dotoli does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### **B. Non Investment-Related Activities**

Dana Dotoli is employed as a Consultant for Technology Finance Partners, a non investment related unaffiliated company. Her role at Technology Finance Partners does not cause a conflict of interest, or intere with her commitment to Sagent Wealth Management.

## **Item 4 Additional Compensation**

Dana Dotoli does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 5 Supervision**

**Supervisor:** Marshall G. Eichenauer, Jr.

**Title:** Owner/Managing Partner

**Phone Number:** (949) 756-2226