

*This brochure supplement provides information about Daniel Joseph Korleski that supplements the Cobalt Private Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Daniel Joseph Korleski if you did not receive Cobalt Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Daniel Joseph Korleski is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Cobalt Private Wealth, LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Daniel Joseph Korleski**

Personal CRD Number: 2053083

Investment Adviser Representative

Cobalt Private Wealth, LLC  
5251 Bancroft Heights  
Colorado Springs, CO 80906  
(719) 332-3863  
[danielkorleski@cobaltprivatewealth.com](mailto:danielkorleski@cobaltprivatewealth.com)

UPDATED: 02/05/2014

## Item 2: Educational Background and Business Experience

**Name:** Daniel Joseph Korleski

**Born:** 1965

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor of Science Finance, Florida State University - 1989

#### **Business Background:**

02/2014 - Present	Investment Adviser Representative Cobalt Private Wealth, LLC
09/2013 - Present	Owner Cobalt Private Wealth, LLC
02/2012 - 12/2013	Vice President & Chief Investment Officer Advisers Investment Management
04/2007 - 02/2012	SVP - Chief Investment Officer ANB Bank
02/2004 - 04/2007	VP - Regional Investment Manager Wells Fargo Bank

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Daniel Joseph Korleski is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Other than salary, annual bonuses, or regular bonuses, Daniel Joseph Korleski does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Cobalt Private Wealth, LLC.

### **Item 6: Supervision**

Daniel Joseph Korleski is a co-owner and co-supervisor of Cobalt Private Wealth, LLC, and works closely with co-supervisor David M Kuhn. All advice provided to clients is reviewed by this co-supervisor prior to implementation. David Kuhn can be reached at (720) 999-2732.

### **Item 7: Requirements For State Registered Advisers**

*This disclosure is required by Colorado state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Daniel Joseph Korleski has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Daniel Joseph Korleski has NOT been the subject of a bankruptcy petition in the past ten years.