



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Jeffrey W. Stark

Office Address

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The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148. Telephone: (630) 873-8520. Website: www.forumfinancial.com.

This brochure supplement provides information about Jeffrey W. Stark that supplements the Forum Financial Management, LP ("Forum") Form ADV Part 2A Brochure ("firm brochure"). You should have received a copy of that firm brochure. Please contact us at (630) 873-8520 if you did not receive Forum's firm brochure or if you have any questions about the contents of this brochure supplement.

Additional information about Jeffrey W. Stark is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Full Legal Name: Jeffrey W. Stark

Born: 1963

Education Background:

- Sienna College: Bachelor of Science (BS), Computer Science – 1985

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 12/2018 to Present
- Stark & D’Aprile CPAs PC: Client Service Associate – 12/2022 to Present
- Stark & Basila CPAs PC: Client Service Associate – 10/2018 to 11/2022
- Rensselaer Polytechnic Institute: Associate Director of Business Intelligence and Development – 11/2001 to 8/2018

Professional Designations, Certifications, and Exams:

- Uniform Combined State Law Exam (Series 66 Exam), 2007
- Uniform Investment Adviser Law Examination (Series 65 Exam), 2019

Please refer to Part 2B Appendix 1 for definitions of the above.

Item 3 – Disciplinary Information

Mr. Stark has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. Stark is a Client Service Associate with Stark & D’Aprile CPAs PC. Clients of Forum may also receive accounting-related services from Stark & D’Aprile CPAs PC. The services provided and compensation received by Mr. Stark in this role are separate and distinct from any fees paid for advisory services provided by Forum.

Please refer to “Item 10 – Other Financial Industry Activities and Affiliations” of Forum’s firm brochure for complete disclosure of the above referenced investment-related activities.

Item 5 – Additional Compensation

Refer to the Other Business Activities section above for disclosures on Mr. Stark’s receipt of additional compensation as a result of his other business activities.

Also, please refer to “Item 5 – Fees and Compensation” and “Item 14 – Client Referrals and Other Compensation” of Forum’s firm brochure for additional disclosures on this topic.

Item 6 – Supervision

As a registered investment adviser, Forum administers and enforces a regulatory compliance program, reasonably designed to detect and prevent violations of the Investment Advisers Act of 1940 and other applicable state and federal securities laws.

Forum's compliance program is overseen by Forum's Chief Compliance Officer, Allison Tronnes, who delegates advisor supervision responsibilities among various advisor support personnel and teams.

Forum has a dedicated Advisor Support team, and within that team is the primary point of contact for advisor supervision. Should a client or prospective client have any questions or concerns, please reach out to one of the following:

Nikki Hopson

Advisor Development and Supervision
(630) 376-4367
nhopson@forumfinancial.com

Allison Tronnes

Chief Compliance Officer
(630) 873-8512
atronnes@forumfinancial.com

Item 7 – Part 2B Appendix 1

Uniform Combined State Law Exam (Series 66 Exam)

The Uniform Combined State Law Exam (Series 66 exam) is a North American Securities Administrators Association (NASAA) exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 100 scored questions. Candidates have 150 minutes to complete the exam. In order for a candidate to pass the Series 66 exam, the individual must correctly answer at least 73 of the 100 scored questions. For more information, refer to the NASAA website at: <https://www.nasaa.org/exams/>.

Uniform Investment Adviser Law Examination (Series 65 Exam)

The Uniform Investment Adviser Law Examination (Series 65 exam) is a North American Securities Administrators Association (NASAA) exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 130 scored questions. Candidates have 180 minutes to complete the exam. In order for a candidate to pass the Series 65 exam, the individual must correctly answer at least 94 of the 130 scored questions. For more information, refer to the NASAA website at: <https://www.nasaa.org/exams/>.