



**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**Megan Elizabeth Martin**

**Office Address**

4709 West Golf Road, Suite 1015  
Skokie, IL 60076  
Telephone: (847) 581-6012

**February 6, 2023**

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](http://www.forumfinancial.com).

This brochure supplement provides information about Megan Elizabeth Martin 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 Megan Elizabeth Martin is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Full Legal Name:** Megan Elizabeth Martin

**Born:** 1984

### **Education Background:**

- University of Michigan: Bachelor of Arts (BA), Spanish – 2006

### **Business Experience:**

- Forum Financial Management, LP: Investment Adviser Representative – 1/2019 to Present
- Forum Financial Management, LP: Client Service Associate – 2/2011 to Present

### **Designations and Certifications:**

Ms. Martin has earned the following designation(s) and/or certification(s) and is in good standing with the granting authority:

- Licensed Insurance Agent, 2009

Please refer to Part 2B Appendix 1 for definitions of the above designation(s) and/or certifications(s).

## **Item 3 – Disciplinary Information**

Ms. Martin has no reportable disciplinary history.

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

Ms. Martin is licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees clients pay Forum for advisory services are separate and distinct from the commissions earned by Ms. Martin for insurance-related activities. This presents a conflict of interest because Ms. Martin may have an incentive to recommend insurance products for the purpose of generating commissions. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with 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 Ms. Martin’s receipt of additional compensation as a result of her 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](mailto:nhopson@forumfinancial.com)

**Allison Tronnes**

Chief Compliance Officer

(630) 873-8512

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