

Item 1 – Cover Page



FORM ADV PART 2B BROCHURE SUPPLEMENT

Megan Elizabeth Martin

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February 20, 2024

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 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.

Item 2 – Educational Background and Business Experience

Full Legal Name: Megan Elizabeth Martin

Individual CRD #: 5971855

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

Professional Designations, Certifications, and Exams:

- 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

Ms. Martin has no reportable legal or disciplinary history.

Item 4 – Other Business Activities

Ms. Martin is an independent insurance agent, which accounts for approximately 10% of her time. Clients of Ms. Martin in this business activity could also be clients of Forum Financial Management, LP. The fees earned by Ms. Martin in this capacity are separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Ms. Martin in this outside business activity creates a conflict of interest. However, clients are under no obligation to purchase insurance products through Ms. Martin. As a fiduciary, Ms. Martin has certain legal obligations, including the obligation to act in the clients' best interests.

Please refer to "Item 10 – Other Financial Industry Activities and Affiliations" of Forum's firm brochure for complete disclosure of the above referenced outside business 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

Allison Tronnes

Chief Compliance Officer

(630) 873-8512

atronnes@forumfinancial.com

Item 7 – Part 2B Appendix 1

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/>.