



**Form ADV Part 2B  
Brochure Supplement**

**Megan Elizabeth Martin**

**Office Address**

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**Item 1 – Cover Page**

This Brochure Supplement provides information about Megan Elizabeth Martin that supplements the Forum Financial Management, LP (“Forum”) Form ADV Part 2A (“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. You can also obtain a copy of the Firm Brochure at [www.forumfinancial.com](http://www.forumfinancial.com). The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148.

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  
**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, & Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam)

Please refer to [Appendix](#) for definitions of the above.

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## Item 3 – Disciplinary Information

Megan has no reportable legal or disciplinary history.

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## Item 4 – Other Business Activities

Megan is not engaged in any other business or occupation beyond her role at Forum that is investment-related or otherwise poses a conflict of interest to her provision of advisory services through Forum.

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## Item 5 – Additional Compensation

Megan does not receive any additional compensation or economic benefit for investment advisory or investment-related services beyond her roles at Forum.

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## 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:

### Allison Tronnes

Chief Compliance Officer  
(630) 873-8512

[atronnes@forumfinancial.com](mailto:atronnes@forumfinancial.com)

### Nikki Hopson

Advisor Development and Supervision  
(630) 376-4367

[nhopson@forumfinancial.com](mailto:nhopson@forumfinancial.com)

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## Appendix

### 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/>.