

FORM ADV PART 2B BROCHURE SUPPLEMENT

Dennis Michael Michon

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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 Dennis Michael Michon 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 Dennis Michael Michon is available on the SEC's Investment Adviser Public Disclosure website at <u>www.adviserinfo.sec.gov</u>.

Item 2 – Educational Background and Business Experience

Full Legal Name: Dennis Michael Michon Born: 1954

Education Background:

- DePaul University: Bachelor of Science (BS), Accounting 1976
- University of Illinois Chicago: Juris Doctor (JD) 1980

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative 10/2012 to Present
- Michon & Buckley: Partner 12/2005 to Present
- Tax & Financial Solutions, Inc.: President 12/2005 to Present

Designations and Certifications:

Mr. Michon does not hold any professional designations and/or certifications.

Item 3 – Disciplinary Information

Mr. Michon has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. Michon is also President of Tax & Financial Solutions, Inc. and Partner of Michon & Buckley. Clients of Tax & Financial Solutions, Inc. and Michon & Buckley may also be clients of Forum Financial Management, LP. The services provided and compensation received by Mr. Michon as part of his other business activities are separate and distinct from any fees paid for advisory services provided through Forum. Mr. Michon's outside business activities present a conflict of interest because he may have an incentive to recommend accounting and legal services to clients for the purpose of generating fees.

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. Michon'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 <u>nhopson@forumfinancial.com</u> Allison Tronnes Chief Compliance Officer (630) 873-8512 atronnes@forumfinancial.com