



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Steven John Minturn

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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 Steven John Minturn 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 Steven John Minturn 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: Steven John Minturn

Born: 1985

Education Background:

- University of Chicago Booth School of Business: Master of Business Administration (MBA), Economics and Finance – 2014
- University of Wisconsin: Bachelor of Business Administration (BBA), Finance and Actuarial Science – 2008

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 10/2021 to Present
- BMO Asset Management EMEA: Quantitative Portfolio Consultant – 5/2019 to 5/2021
- BMO Asset Management US: Quantitative Equity Analyst – 10/2015 to 5/2019
- Deloitte Consulting LLP: Senior Consultant – 9/2014 to 9/2015
- Deloitte Consulting LLP: Analyst, Consultant, and Senior Consultant – 7/2008 to 8/2012

Professional Designations, Certifications, and Exams:

- Chartered Financial Analyst (CFA®), 2018

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

Item 3 – Disciplinary Information

Mr. Minturn has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. Minturn is an Independent Contractor with Gurnee Organization, an unaffiliated investment fund targeting publicly-traded micro-cap companies in the United States. In this capacity, Mr. Minturn assists with technical implementation of an investment strategy. He is compensated for his role and typically spends less than five hours per month in this outside business activity.

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 Mr. Minturn’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

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (CFA®) is a professional certification granted by the CFA Institute. It is internationally recognized for its rigorous education and training requirements and its mission to promote and develop a high level of educational, ethical, and professional standards in the investment industry.

To become a CFA® charterholder, an individual must fulfill the following requirements:

- Pass three sequential, six-hour examinations.
- Have at least four years of qualified professional investment experience, a bachelor's degree, or a combination of professional and educational experience totaling four years.
- Join the CFA Institute as a members.
- Commit to abide by and annually reaffirm adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning. The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. For more information, refer to the CFA Institute website at: <https://www.cfainstitute.org/>.