



**Form ADV Part 2B  
Brochure Supplement**

**Mark Jason Schmullen**

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**Item 1 – Cover Page**

This Brochure Supplement provides information about Mark Jason Schmullen 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 Mark Jason Schmullen 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:** Mark Jason Schmulen  
**Individual CRD #:** 6776157  
**Born:** 1980

### Education Background:

- Stanford Graduate School of Business: Master of Science (MS), Management – 2015
- University of Pennsylvania: Bachelor of Arts (BA), International Relations – 2003

### Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 3/2017 to Present
- Jelly Capital, LLC: Manager – 6/2015 to Present
- Real Page, Inc.: Industry Principal and Vice President – 9/2020 to 7/2024
- Chirp Systems, Inc.: Chief Executive Officer and Board Director – 10/2018 to 9/2020

### 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

Mark has no reportable legal or disciplinary history.

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## Item 4 – Other Business Activities

Mark is a Manager with Jelly Capital, LLC, an unaffiliated private investment firm. This activity accounts for approximately 5% of his time. Mark also serves as the Director of the Board of Directors, Chairman of the Governance Committee, as well as a Member of the Audit Committee for Innovative Food Holdings, which accounts for less than 5% of his time. In addition, he is an Entrepreneur-in-Residence for Fifth Wall, a venture capital firm, which accounts for approximately 5% of his time. The compensation received by Mark in these capacities is separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Mark in these outside business activities creates a conflict of interest.

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.

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## Item 5 – Additional Compensation

Mark receives additional compensation as a result of his other business activities disclosed in Item 4 above but does not otherwise receive any economic benefit for investment advisory or investment-related services beyond his role at Forum.

Please also 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.

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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/>