



**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**Robert Ian Wurzburg**

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This brochure supplement provides information about Robert Ian Wurzburg that supplements the Forum Financial Management, LP brochure. You should have received a copy of that brochure. Contact us at 630-873-8520 if you did not receive Forum Financial Management, LP's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Ian Wurzburg (CRD # 5522955) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Robert Ian Wurzburg

**Born:** 1984

### **Education Background:**

- Indiana University, BS Finance, 2006
- University of Chicago - Booth School of Business, MBA Finance and Accounting, 2012

### **Business Background:**

- Forum Financial Management, LP, Investment Adviser Representative, 6/2021 - Present
- Paylocity, Director of Corporate Development, 5/2018 - 7/2019
- Flywheel Capital Partners, Founder and Principal, 8/2016 - 4/2018
- William Blair & Company, Associate, 8/2012 - 8/2016

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Robert Ian Wurzburg has no required disclosures under this item.

## Item 4 Other Business Activities

Robert Ian Wurzburg is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as an Investment Adviser Representative of Forum Financial Management, LP.

## Item 5 Additional Compensation

Robert Ian Wurzburg does not receive any additional compensation beyond that received as an Investment Adviser Representative of Forum Financial Management, LP.

Also, please refer to the Fees and Compensation section and the Client Referrals and Other Compensation section of Forum Financial Management, LP'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:

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