



**Form ADV Part 2B  
Brochure Supplement**

**Jack Stephen Grzenia**

**Office Address**

1200 Harger Road, Suite 220  
Oak Brook, IL 60523  
Telephone: (630) 620-6200

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**Item 1 – Cover Page**

This Brochure Supplement provides information about Jack Stephen Grzenia 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 Jack Stephen Grzenia 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:** Jack Stephen Grzenia

**Individual CRD #:** 6516471

**Born:** 1991

### Education Background:

- Southern Illinois University Carbondale: Bachelor of Science (BS), Animal Science – 2013

### Business Experience:

- MP360° Tax Services, Ltd.: Assistant and Tax Preparer – 2/2024 to Present
- Purshe Kaplan Sterling Investments, Inc.: Registered Representative – 11/2016 to Present
- Forum Financial Management, LP: Investment Adviser Representative – 9/2016 to Present
- MP360° Financial Services: Assistant and Client Service Associate – 2/2015 to Present
- MP360° Tax Services, Ltd.: Assistant – 2/2015 to 6/2023
- Cetera Investment Advisers LLC: Investment Adviser Representative – 8/2016 to 11/2016
- Cetera Financial Specialists LLC: Registered Representative – 6/2015 to 11/2016

### Professional Designations, Certifications, & Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam)
- Enrolled Agent (EA)

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

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## Item 3 – Disciplinary Information

Jack has no reportable legal or disciplinary history.

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## Item 4 – Other Business Activities

Jack is a Registered Representative with Purshe Kaplan Sterling Investments, Inc. (PKSI), a broker-dealer, which accounts for 10% of his time. He is also an Assistant and Tax Preparer of MP360° Tax Services, Ltd., which accounts for 10% of his time. Additionally, he is an Assistant and Client Service Associate of MP360° Financial Services, which accounts for 70% of his time. Furthermore, he is an independent insurance agent, selling insurance products, which accounts for less than 5% of his time.

Clients of PKSI, MP360° Tax Services, Ltd., MP360° Financial Services, or Jack in these business activities could also be clients of Forum Financial Management, LP. The compensation received by Jack 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 Jack in these outside business activities creates a conflict of interest. However, clients are under no obligation to purchase investment services, securities, insurance, or tax and accounting services through Jack.

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

Jack 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/>.

### **Enrolled Agent (EA)**

An Enrolled Agent (EA) is a tax professional authorized by the United States government to represent taxpayers in matters regarding the Internal Revenue Service (IRS). EAs may become credentialed in two different ways: (i) with five years of IRS experience regularly interpreting tax regulations, or (ii) through the successful completion of the three-part Special Enrollment Exam (SEE). EA candidates must also pass a background check before they are granted the EA status. To maintain the EA status, individuals must adhere to ethical standards and complete 72 hours of continuing education every three years. For more information, refer to the IRS website at: <https://www.irs.gov/tax-professionals/enrolled-agents/enrolled-agent-information>.