



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Michael William Kite

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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 Michael William Kite 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 Michael William Kite 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: Michael William Kite

Born: 1983

Education Background:

- University of Illinois: Bachelor of Arts (BA), History – 2005
- John Marshall Law School: Juris Doctor (JD) – 2009

Business Experience:

- Williams & Kite, LLC: Partner and Attorney – 1/2019 to Present
- Forum Financial Management, LP: Investment Adviser Representative – 1/2012 to Present
- Pinnacle Wealth Management LLC: Member – 10/2011 to Present
- Purshe Kaplan Sterling Investments, Inc.: Registered Representative – 6/2011 to Present
- Faermark & Williams: Associate Attorney – 2/2012 to 12/2018

Professional Designations, Certifications, and Exams:

- General Securities Representative Examination (Series 7 Exam), 2011
- Uniform Combined State Law Exam (Series 66 Exam), 2011
- Securities Industry Essentials® (SIE®) Exam, 2018

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

Item 3 – Disciplinary Information

Mr. Kite has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. Kite is a Registered Representative with Purshe Kaplan Sterling Investments, Inc. (PKSI). In this capacity, Mr. Kite may recommend securities and/or insurance products offered by PKSI as part of clients' investment portfolios. If clients purchase these products through Mr. Kite, he will receive the customary commissions. Additionally, Mr. Kite may receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Kite an incentive to recommend investment products based on the compensation received.

Mr. Kite is also a Partner and Attorney at Williams & Kite, LLC, a Member of Pinnacle Wealth Management LLC, and is separately licensed as an insurance producer or broker for one or more insurance companies.

Clients of Mr. Kite in his other roles may also be clients of Forum Financial Management, LP. The fees earned by Mr. Kite in his other business activities are separate and apart from the fees clients pay Forum for advisory services. Mr. Kite's outside business activities present a conflict of interest because he may have an incentive to recommend legal and insurance services 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. Kite'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

General Securities Representative Examination (Series 7 Exam)

The General Securities Representative Examination (Series 7 exam) is an industry exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 125 scored questions. The exam assesses the competency of an entry-level registered representative to perform their job as a general securities representative and measures the degree to which each candidate possesses the knowledge needed to perform the critical functions of a general securities representative, including sales of corporate securities, municipal securities, investment company securities, variable annuities, direct participation programs, options and government securities. Candidates must pass the Securities Industry Essentials (SIE) exam and the Series 7 exam to obtain the General Securities Representative registration. For more information, refer to the FINRA website at: <https://www.finra.org/registration-exams-ce/qualification-exams/series7>.

Securities Industry Essentials® (SIE®) Exam

The Securities Industry Essentials® (SIE®) Exam is a exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 75 multiple choice questions. Candidates have 75 minutes to complete the exam. In order for a candidate to pass the SIE® Exam, the individual must correctly answer 70 of the 75 scored questions. For more information, refer to the FINRA website at: <https://www.finra.org/registration-exams-ce/qualification-exams/securities-industry-essentials-exam>.

Uniform Combined State Law Exam (Series 66 Exam)

The Uniform Combined State Law Exam (Series 66 exam) is a North American Securities Administrators Association (NASAA) exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 100 scored questions. Candidates have 150 minutes to complete the exam. In order for a candidate to pass the Series 66 exam, the individual must correctly answer at least 73 of the 100 scored questions. For more information, refer to the NASAA website at: <https://www.nasaa.org/exams/>.