FORM ADV PART 2B
BROCHURE SUPPLEMENT

David C. McClellan

OFFICE ADDRESS:
8300 Lime Creek Road
Volente, TX 78641
Telephone: 312-933-8823

Forum Financial Management, LP
1900 S. Highland Ave.
Suite 100
Lombard, IL 60148
Telephone: 630-873-8520

June 11, 2019

This brochure supplement provides information about David Cotten McClellan 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 David Cotten McClellan (CRD # 4352059) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: David Cotten McClellan
Born: 1968

Education Background:
- University of Chicago, Booth School of Business, M.B.A. Finance, Strategy Marketing, 1998
- University of Texas at Austin, B.A. with Honors, Economics, History, 1990

Business Experience:
- Forum Financial Management, LP, Investment Adviser Representative, 8/2015 - Present
- DZee Solutions, Inc. d/b/a Aivante, VP and Head of Wealth Management Solutions, 02/2019 - Present
- DZee Solutions, Inc., Business Advisor, 01/2016 - 02/2019
- HedgeACT, Consultant, 5/2016 - 12/2016
- Albridge, An Affiliate of Pershing LLC an BNY Mellon Company, Director, Strategy & Execution, 2/2011 - 8/2015
- Inautix, An Affiliate of Pershing LLC an BNY Mellon Company, Director, Business Development, 9/2008 - 1/2011
- Proofspace, VP & General Manager, Financial Services, 4/2007 - 4/2008
- Morningstar, VP, Advisor Business Development, 9/2004 - 4/2007
- Morningstar, National Account Manager, 8/2001 - 08/2004
- TwentyTen, Partner, 08/2000 - 04/2001
- Incent, VP, Sales & Marketing, 01/2000 - 08/2000
- The Cambridge Group, Consultant, 07/1998 - 12/1999
- Anderson Consulting Strategic Services, Summer Intern, 07/1997 - 09/1997
- University of Chicago, Graduate School of Business, MBA Student, 08/1996 - 06/1998
- Price Waterhouse, Senior Consultant, 10/1993 - 08/1996
- Electronic Data Systems, Systems Engineer, 10/1990 - 10/1993

Designations/Certifications:
David Cotten McClellan has earned the following designation(s)/certification(s) and is in good standing with the granting authority:
- NASAA Series 65 - Uniform Investment Advisor Law Examination, 2015

Item 3 Disciplinary Information

Mr. David C. McClellan has no reportable disciplinary history.

Item 4 Other Business Activities

David Cotten McClellan is the Vice President and Head of Wealth Management Solutions to DZee Solutions, Inc. d/b/a Aivante, an unaffiliated technology company. In this capacity, Mr. McClellan advises on business and go-to-market strategy and leads sales and marketing activities to broker-dealers and RIAs. Mr. McClellan's affiliation with Aivante, is in no way an endorsement of any product by Forum Financial Management, LP. At no additional costs to the client, Mr. McClellan may use illustrations produced by Aivante, software for his clients. Mr. McClellan has no other investment-related outside business activities beyond this capacity, and he does not otherwise receive commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. McClellan's receipt of additional compensation as a result of his activities.

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

Forum has implemented a Code of Ethics and an internal compliance program that guides each associated person in meeting their fiduciary obligations to clients. Advice provided to clients is directed by Forum's investment philosophy. The firm monitors the advice given to Forum's advisory clients by its advisors in the following ways:

1. an initial review of the asset allocation for a new client as compared to the client's risk tolerance and investment objectives;
2. periodic reviews of a random number of the advisor's client files in order to provide reasonable assurance that the advice provided by the advisor to his or her clients is consistent with the client's stated investment objectives and Forum's policies and procedures, and
3. in-person or telephonic meetings with advisors to review client activity. Moreover, on at least an annual basis, Forum offers training to each of its advisors to cover investments, new products, and related compliance concerns.

David C. McClellan is supervised by Faye H. Nybo, Director of Supervision. Ms. Nybo can be reached at (630) 873-8503 or fnybo@forumfin.com.