

Item 1 – Cover Page



FORM ADV PART 2B BROCHURE SUPPLEMENT

Robert Thomas Methven

Office Address

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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 Robert Thomas Methven 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 Robert Thomas Methven 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: Robert Thomas Methven

Individual CRD #: 3004179

Born: 1961

Education Background:

- University of Canterbury: Bachelor of Commerce (BCom), Finance – 1987
- University of Canterbury: Bachelor of Laws (LLB), Law – 1984

Business Experience:

- F.A.M., LLC: Member – 1/2014 to Present
- Methven Business Services LLC: Managing Member – 7/2010 to Present
- Forum Financial Management, LP: Partner – 7/2007 to Present

Professional Designations, Certifications, and Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam), 2003

Please refer to Appendix 1 for definitions of the above.

Item 3 – Disciplinary Information

Robert has no reportable legal or disciplinary history.

Item 4 – Other Business Activities

Robert is the Managing Member of Methven Business Services LLC, which accounts for approximately 10% of his time. He is also an independent insurance agent, which accounts for approximately 25% of his time. Clients of Methven Business Services LLC or Robert in these capacities are separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Robert in these outside business activities creates a conflict of interest. However, clients are under no obligation to purchase tax and accounting services or insurance products through Robert. As a fiduciary, Robert has certain legal obligations, including the obligation to act in the clients' best interests.

Additionally, he is a volunteer Member of the Board of Directors with Do Rights Inc., a non-profit organization, which accounts for approximately 5% of his time. This outside business activity does not pose a conflict of interest to his provision of advisory services through Forum.

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.

Item 5 – Additional Compensation

Robert receives additional compensation as a result of his other business activities disclosed in the Other Business Activities section above. 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.

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 – Appendix 1

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/>.