



**Form ADV Part 2B
Brochure Supplement**

Robert Thomas Methven

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Item 1 – Cover Page

This Brochure Supplement provides information about Robert Thomas Methven 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. The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148.

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:

- Forum Financial Management, LP: Partner – 7/2007 to Present

Professional Designations, Certifications, & Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam)

Please refer to [Appendix](#) 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 less than 5% of his time. In addition, Robert is an independent insurance agent, which accounts for approximately 5% of his time. Clients of Methven Business Services, LLC or Robert in these other business activities could also be clients of Forum Financial Management, LP.

The compensation received by Robert 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 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.

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 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.

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

Nikki Hopson

Advisor Development and Supervision
(630) 376-4367

nhopson@forumfinancial.com

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/>.