



**Form ADV Part 2B  
Brochure Supplement**

**Dennis Michael Michon**

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**Item 1 – Cover Page**

This Brochure Supplement provides information about Dennis Michael Michon 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 Dennis Michael Michon 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:** Dennis Michael Michon

**Individual CRD #:** 1387045

**Born:** 1954

### Education Background:

- University of Illinois Chicago: Juris Doctor (JD) – 1980
- DePaul University: Bachelor of Science (BS), Accounting – 1976

### Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 10/2012 to Present
- Michon & Buckley: Partner and Attorney – 12/2005 to Present
- Tax & Financial Solutions, Inc.: President – 12/2005 to Present

### Professional Designations, Certifications, & Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam)
- Juris Doctor (JD)

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

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## Item 3 – Disciplinary Information

Dennis has no reportable legal or disciplinary history.

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## Item 4 – Other Business Activities

Dennis is the Partner of, and an Attorney with, Michon & Buckley, which accounts for less than 5% of his time. He is also the President of Tax & Financial Solutions, Inc., which accounts for approximately 50% of his time. Clients of Michon & Buckley, Tax & Financial Solutions, Inc., or Dennis in these business activities could also be clients of Forum Financial Management, LP.

The compensation received by Dennis 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 Dennis in these outside business activities creates a conflict of interest. However, clients are under no obligation to purchase legal, tax, or accounting services through Dennis.

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

Dennis 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)

## 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/>.

### **Juris Doctor (JD)**

A Juris Doctor (JD) is a professional degree in law that equips individuals with the knowledge and skills necessary to practice law. It is typically earned after three years of full-time, graduate-level study at an accredited law school following completion of a bachelor's degree. Once an individual has completed their JD, they must pass the bar exam in the state where they intend to practice law. The bar exam is a comprehensive test that assesses a candidate's knowledge of legal concepts, analytical skills, and ability to apply the law in real-world scenarios. Additionally, prospective lawyers must meet other requirements, such as completing a character and fitness evaluation, to be admitted to the bar and become licensed to practice law. Further, most states also require periodic continuing education in order to maintain licensure.