



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

William Orrin Morrison, Jr.

Office Address

440 South 3rd Street, Suite 202
Saint Charles, IL 60174
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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 William Orrin Morrison, Jr. 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 William Orrin Morrison, Jr. 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: William Orrin Morrison, Jr.

Born: 1953

Education Background:

- Millikin University: Bachelor of Science (BS), Accounting – 1975

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 2/2015 to Present
- Morrison & Associates Wealth Management: Owner and President – 1/1979 to Present
- Purshe Kaplan Sterling Investments, Inc.: Registered Representative – 2/2015 to 10/2019
- Apex CPAs & Consultants, Inc.: Tax Preparer – 12/2017 to 8/2019
- Cetera Investment Advisers LLC: Investment Advisor Representative – 12/1998 to 2/2015
- Cetera Financial Specialists LLC: Registered Representative – 8/1986 to 2/2015

Designations and Certifications:

Mr. Morrison has earned the following designation(s) and/or certification(s) and is in good standing with the granting authority:

- Certified Public Accountant (CPA), 1996

Please refer to Part 2B Appendix 1 for definitions of the above designation(s) and/or certifications(s).

Item 3 – Disciplinary Information

Mr. Morrison has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. Morrison is Owner and President of Morrison & Associates Wealth Management. Clients of Morrison & Associates Wealth Management may also be clients of Forum Financial Management, LP. The services provided and compensation received by Mr. Morrison through Morrison & Associates Wealth Management are separate and distinct from any fees paid for advisory services provided by Forum. Mr. Morrison's outside business activity presents a conflict of interest because he may have an incentive to recommend other services through Morrison and Associates Wealth Management to Forum clients for the purpose of generating fees and/or commissions.

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. Morrison Jr.'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

Certified Public Accountant (CPA)

The Certified Public Accountant (CPA) is a professional designation for licensed accounting professionals. CPAs are licensed and regulated by their state Boards of Accountancy. While state laws and regulations vary, the education, experience, and testing requirements for licensure as a CPA generally include: a bachelor’s degree in business administration, finance, or accounting, in addition to having completed 150 hours of education; a minimum of two years of public accounting experience; and successful passage of the Uniform CPA Examination® (“CPA Exam”). The CPA Exam comprises four sections: auditing and attestation, business environment and concepts, financial accounting and reporting, and regulation.

In order to maintain a CPA designation, states generally require completion of continuing professional education (hourly requirements vary by state). Additionally, all American Institute of Certified Public Accountants (AICPA) members must adhere to a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own. For more information, refer to the AICPA website at: <https://www.aicpa.org/home>.