

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Heidi Christa Verbiscer

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This brochure supplement provides information about Heidi Christa Verbiscer 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 Heidi Christa Verbiscer (CRD # 7195056) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Heidi Christa Verbiscer

Born: 1974

Education Background:

- University of Illinois at Chicago, BS Accounting, 1999
- College of Lake County, None Business, 8/1993 - 5/1996

Business Background:

- Forum Financial Management, LP, Investment Adviser Representative, 10/2019 - Present
- Generations Tax & Advisory Services, LLC, President/Owner, 10/2014 - Present
- Miller Cooper & Co., LTD., Senior Manager Tax, 7/2012 - 4/2014
- Ernst & Young LLP, Senior Manager, 9/2011 - 4/2012
- Crowe Horwath LLP, Senior Manager - FTS, 12/2006 - 9/2011

Designations/Certifications:

Heidi C Verbiscer has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Series 65- Uniform Investment Adviser, 2019

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Heidi Christa Verbiscer has no required disclosures under this item.

Item 4 Other Business Activities

Heidi Christa Verbiscer is President/Owner of Generations Tax & Advisory Services, LLC, a Tax, Accounting & Advisory Business for small businesses and individuals. Ms. Verbiscer's duties as the President/Owner of Generations Tax & Advisory Services, LLC do not create a conflict of interest to her provision of advisory services through Forum Financial Management, LP.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Ms. Verbiscer's receipt of additional compensation as a result of her other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) 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.

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