



FORM ADV PART 2B
BROCHURE SUPPLEMENT

Michael W. Kite

OFFICE ADDRESS:

1900 S. Highland Ave.
Suite 100
Lombard, IL 60148
Telephone: 630-873-8531

Forum Financial Management, LP

1900 S. Highland Ave.
Suite 100
Lombard, IL 60148
Telephone: 630-873-8520

October 10, 2022

This brochure supplement provides information about Michael William Kite that supplements the Forum Financial Management, LP brochure. You should have received a copy of that brochure. Please 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 Michael William Kite is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Michael W. Kite

Born: 1983

Education Background:

- The John Marshall Law School, Juris Doctor, 2009.
- University of Illinois, Bachelor of Arts, History, 2005.

Business Experience:

- Forum Financial Management, LP, Investment Advisor Representative, 1/2012 to Present.
- Purshe Kaplan Sterling Investments, Registered Representative, 6/2011 to Present.
- Pinnacle Wealth Management, LLC, Member, 9/2011 to Present.
- Williams & Kite, LLC, Attorney, 12/2018 to Present
- Faermark & Williams, Attorney, 2/2012 to 12/2018
- Pinnacle Wealth Management, LLC, Client Service Associate, 2/2011 to 9/2011.
- Colky & Kirsh, LLC, Associate Attorney, 6/2010 to 1/2011.
- Synergy Legal Professionals, Contract Attorney, 8/2009 to 1/2011.
- Knosher & Kite Attorneys at Law, Attorney, 1/2009 to 6/2010.

Designations/Certifications:

Michael W. Kite has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Series 7 - General Securities Representative 2011.
- Series 66 - Uniform Securities Agent and Investment Adviser Representative 2011.
- Juris Doctor - The John Marshall Law School 2009.
- Admitted to Practice Law in the State of Illinois 2009.

Item 3 Disciplinary Information

Michael W. Kite has no reportable disciplinary history.

Item 4 Other Business Activities

Michael W. Kite is a registered representative with Purshe Kaplan Sterling Investments (PKSI), Member FINRA/SIPC. In this capacity, Mr. Kite may recommend securities and/or insurance products offered by PKSI as part of your investment portfolio. If clients purchase these products through Mr. Kite, he will receive the customary commissions in his separate capacity as a registered representative of PKSI. Additionally, Mr. Kite may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Kite an incentive to recommend investment products based on the compensation received. Please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Forum Financial Management, LP's firm brochure for additional disclosures on this topic.

Michael W. Kite is also a Partner at Williams & Kite, LLC, Member of Pinnacle Wealth Management LLC and is separately licensed as an insurance producer or broker for one or more insurance companies. Clients of Mr. Kite may also be clients of Forum Financial Management, LP. The fees earned by Mr. Kite in his outside business activities are separate and apart from the fees you pay our firm for advisory services. Mr. Kite's outside business activities present a conflict of interest because

Mr. Kite may have an incentive to recommend legal and insurance services to you for the purpose of generating fees. Mr. Kite spends 90% of his professional time as an attorney, insurance agent and registered representative.

Please refer to Form ADV: Firm Brochure, Item 10, (Other Financial Industry Activities and Affiliations) for complete disclosure of the above referenced Investment-Related Activities.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Kite's receipt of additional compensation as a result of his activities as a registered representative of PKSI, Attorney at Williams & Kite, LLC, Member of Pinnacle Wealth Management LLC and independent insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Forum Financial Management, LP'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
Manager, Advisor Development and Supervision
(630) 376-4367
nhopson@forumfin.com

Allison Tronnes
Chief Compliance Officer
(630) 873-8512
atronnes@forumfin.com