



FORM ADV PART 2B
BROCHURE SUPPLEMENT

Megan E. Martin

OFFICE ADDRESS:

4709 W. Golf Road
Suite 1015
Skokie, IL 60076
Telephone: 847-581-6012

Forum Financial Management, LP

1900 S. Highland Ave.
Suite 100
Lombard, IL 60148
Telephone: 630-873-8515

October 12, 2022

This brochure supplement provides information about Megan Elizabeth Martin that supplements the Forum Financial Management, LP brochure. You should have received a copy of that brochure. Contact us at 630-873-8515 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 Megan Elizabeth Martin (CRD # 5971855) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Megan Elizabeth Martin

Born: 1984

Education Background:

- University of Michigan, BA, Spanish, 2006.

Business Experience:

- Forum Financial Management, LP, Investment Adviser Representative, 01/2019 - Present.
- Forum Financial Management, LP, Client Service Associate, 02/2011 - Present.
- AGT Tax & Insurance Services, Senior Account Executive/Sales Support Coordinator, 01/2008 - 02/2011.
- TCF Bank, Shift Supervisor, 05/2005 - 12/2007.

Designations/Certifications:

Megan E. Martin has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Series 65 - Uniform Securities Agent State Law Examination; NASAA; 2019.
- Licensed Insurance Agent (Life), 2009.

Item 3 Disciplinary Information

Megan Elizabeth Martin has no reportable disciplinary history.

Item 4 Other Business Activities

Megan Elizabeth Martin is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions for these activities earned by Mrs. Martin for insurance-related activities. This presents a conflict of interest because Mrs. Martin may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the Other Business Activities section above for disclosures on Mrs. Martin's receipt of additional compensation as a result of his 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

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