



FORM ADV PART 2B
BROCHURE SUPPLEMENT

David C. McClellan

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October 11, 2022

This brochure supplement provides information about David Cotten McClellan 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 David Cotten McClellan (CRD # 4352059) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: David Cotten McClellan

Education Background:

- University of Chicago, Booth School of Business, M.B.A. Finance, Strategy Marketing, 1998
- University of Texas at Austin, B.A. with Honors, Economics, History, 1990

Business Experience:

- Forum Financial Management, LP, Partner, 07/2022 - Present
- Forum Financial Management, LP, Investment Adviser Representative, 08/2015 - Present
- DZee Solutions, Inc. d/b/a Aivante, VP and Head of Wealth Management Solutions, 02/2019 - Present
- DZee Solutions, Inc., Business Advisor, 01/2016 - 02/2019
- HedgeACT, Consultant, 5/2016 - 12/2016
- Albridge, An Affiliate of Pershing LLC an BNY Mellon Company, Director, Strategy & Execution, 2/2011 - 8/2015
- Inautix, An Affiliate of Pershing LLC an BNY Mellon Company, Director, Business Development, 9/2008 - 1/2011
- Proofspace, VP & General Manager, Financial Services, 4/2007 - 4/2008
- Morningstar, VP, Advisor Business Development, 9/2004 - 4/2007
- Morningstar, National Account Manager, 8/2001 - 08/2004
- TwentyTen, Partner, 08/2000 - 04/2001
- Incent, VP, Sales & Marketing, 01/2000 - 08/2000
- The Cambridge Group, Consultant, 07/1998 - 12/1999
- Anderson Consulting Strategic Services, Summer Intern, 07/1997 - 09/1997
- University of Chicago, Graduate School of Business, MBA Student, 08/1996 - 06/1998
- Price Waterhouse, Senior Consultant, 10/1993 - 08/1996
- Electronic Data Systems, Systems Engineer, 10/1990 - 10/1993

Designations/Certifications:

David Cotten McClellan has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- NASAA Series 65 - Uniform Investment Advisor Law Examination, 2015

Item 3 Disciplinary Information

Mr. David C. McClellan has no reportable disciplinary history.

Item 4 Other Business Activities

David Cotten McClellan is the Vice President and Head of Wealth Management Solutions to DZee Solutions, Inc. d/b/a Aivante, an unaffiliated technology company. In this capacity, Mr. McClellan advises on business and go-to-market strategy and leads sales and marketing activities to broker-dealers and RIAs. Mr. McClellan's affiliation with Aivante, is in no way an endorsement of any product by Forum Financial Management, LP. At no additional costs to the client, Mr. McClellan may use illustrations produced by Aivante, software for his clients. Mr. McClellan has no other investment-related outside business activities beyond this capacity, and he does not otherwise receive commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. McClellan's receipt of additional compensation as a result of his activities.

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
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Chief Compliance Officer
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