



FORM ADV PART 2B
BROCHURE SUPPLEMENT

Jeffrey W. Stark

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October 6, 2022

This brochure supplement provides information about Jeffrey W. Stark 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 Jeffrey W. Stark (CRD # 5393870) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Jeffrey Walter Stark

Year of Birth: 1963

Education Background:

- Sienna College, Loudonville, NY, BS Computer Science, 1985

Business Background:

- Forum Financial Management, LP, Investment Adviser Representative, 12/2018 - Present
- Stark & Basila CPAs, PC, CSA, 10/2018 - Present
- Rensselaer Polytechnic Institute, Associate Director of Business Intelligence & Development, 11/2001 - 8/2018
- Genworth Financial Advisers Corporation, Investment Adviser Representative, 7/2007 - 4/2010
- Genworth Financial Securities Corporation, Registered Representative, 7/2007 - 4/2010

Designations/Certifications:

Jeffrey W. Stark 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

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. Mr. Jeffrey W. Stark has no required disclosures under this item.

Item 4 Other Business Activities

Jeffrey Walter Stark is also a Client Service Associate with Stark & Basila CPAs, PC. Clients of our firm may also receive accounting related services from Mr. Stark. The services provided and compensation received by Mr. Stark for accounting related activities are separate and distinct from any fees paid for advisory services provided by our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Stark'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
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Allison Tronnes
Chief Compliance Officer
(630) 873-8512
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