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'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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(630) 376-4367
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Allison Tronnes
Chief Compliance Officer
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