



**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**Robert Thomas Methven**

**Office Address**

14321 Winter Breeze Drive, Suite 24  
Midlothian, VA 23113  
Telephone: (804) 916-0889

**March 15, 2023**

The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148. Telephone: (630) 873-8520. Website: [www.forumfinancial.com](http://www.forumfinancial.com).

This brochure supplement provides information about Robert Thomas Methven that supplements the Forum Financial Management, LP ("Forum") Form ADV Part 2A Brochure ("firm brochure"). You should have received a copy of that firm brochure. Please contact us at (630) 873-8520 if you did not receive Forum's firm brochure or if you have any questions about the contents of this brochure supplement.

Additional information about Robert Thomas Methven is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – Educational Background and Business Experience**

**Full Legal Name:** Robert Thomas Methven

**Born:** 1961

### **Education Background:**

- University of Canterbury: Bachelor of Laws (LLB), Law – 1984
- University of Canterbury: Bachelor of Commerce (BCom), Finance – 1987

### **Business Experience:**

- Forum Financial Management, LP: Partner – 7/2007 to Present
- Methven Business Services LLC: Member – 7/2010 to Present
- F.A.M., LLC: Member – 1/2014 to Present

### **Professional Designations, Certifications, and Exams:**

- Uniform Investment Adviser Law Examination (Series 65 Exam), 2003

Please refer to Part 2B Appendix 1 for definitions of the above.

## **Item 3 – Disciplinary Information**

Mr. Methven has no reportable disciplinary history.

## **Item 4 – Other Business Activities**

Mr. Methven is a Member of Methven Business Services, LLC and an independent insurance agent. Clients of Methven Business Services, LLC and Mr. Methven's insurance clients may also be clients of Forum Financial Management, LP. The fees earned by Mr. Methven in his outside business activities are separate and apart from the fees clients pay Forum for advisory services. Mr. Methven's outside business activities present a conflict of interest because he may have an incentive to recommend tax and insurance services to you for the purpose of generating fees.

Please refer to "Item 10 – Other Financial Industry Activities and Affiliations" of Forum's firm brochure for complete disclosure of the above referenced investment-related activities.

## **Item 5 – Additional Compensation**

Refer to the Other Business Activities section above for disclosures on Mr. Methven's receipt of additional compensation as a result of his other business activities.

Also, please refer to "Item 5 – Fees and Compensation" and "Item 14 – Client Referrals and Other Compensation" of Forum'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**

Advisor Development and Supervision  
(630) 376-4367  
[nhopson@forumfinancial.com](mailto:nhopson@forumfinancial.com)

**Allison Tronnes**

Chief Compliance Officer  
(630) 873-8512  
[atronnes@forumfinancial.com](mailto:atronnes@forumfinancial.com)

## Item 7 – Part 2B Appendix 1

### **Uniform Investment Adviser Law Examination (Series 65 Exam)**

The Uniform Investment Adviser Law Examination (Series 65 exam) is a North American Securities Administrators Association (NASAA) exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 130 scored questions. Candidates have 180 minutes to complete the exam. In order for a candidate to pass the Series 65 exam, the individual must correctly answer at least 94 of the 130 scored questions. For more information, refer to the NASAA website at: <https://www.nasaa.org/exams/>.