



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Sage Vitale D'Aprile

Office Address

132 Mohawk Street
Cohoes, NY 12047
Telephone: (518) 237-3641

December 13, 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.

This brochure supplement provides information about Sage Vitale D'Aprile 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 Sage Vitale D'Aprile is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Full Legal Name: Sage Vitale D'Aprile

Born: 1990

Education Background:

- Rensselaer Polytechnic Institute: Bachelor of Science (BS), Business and Management – 2012

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 6/2023 to Present
- Stark & D'Aprile CPAs PC: Client Service Associate – 6/2023 to Present
- United States Marines: Inactive Reserves – 6/2023 to Present
- United States Marines: Officer and Pilot – 7/2012 to 6/2023

Professional Designations, Certifications, and Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam), 2023

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

Item 3 – Disciplinary Information

Mr. D'Aprile has no reportable disciplinary history.

Item 4 – Other Business Activities

Mr. D'Aprile is a Client Service Associate with Stark & D'Aprile CPAs PC. Clients of Stark & D'Aprile CPAs PC or Mr. D'Aprile in this business activity could also be clients of Forum Financial Management, LP. The fees earned by Mr. D'Aprile in this capacity are separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Mr. D'Aprile in this outside business activity creates a conflict of interest. However, clients are under no obligation to purchase tax and accounting services through Mr. D'Aprile. As a fiduciary, Mr. D'Aprile has certain legal obligations, including the obligation to act in the clients' best interests.

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

Item 5 – Additional Compensation

Refer to the Other Business Activities section above for disclosures on Mr. D'Aprile'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

Allison Tronnes

Chief Compliance Officer

(630) 873-8512

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/>.