



**Form ADV Part 2B
Brochure Supplement**

Sage Vitale D'Aprile

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

March 7, 2025

Item 1 – Cover Page

This Brochure Supplement provides information about Sage Vitale D'Aprile that supplements the Forum Financial Management, LP ("Forum") Form ADV Part 2A ("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. You can also obtain a copy of the Firm Brochure at www.forumfinancial.com. The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148.

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

Individual CRD #: 7770342

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: Tax and 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, & Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam)
- Enrolled Agent (EA)

Please refer to [Appendix](#) for definitions of the above.

Item 3 – Disciplinary Information

Sage has no reportable legal or disciplinary history.

Item 4 – Other Business Activities

Sage is a Tax and Client Service Associate with Stark & D'Aprile CPAs PC. This activity accounts for approximately 60% of his time. Sage receives additional compensation for this outside business activity. Clients of Stark & D'Aprile CPAs PC or Sage in this business activity could also be clients of Forum Financial Management, LP. The compensation received by Sage in this capacity is separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Sage in this outside business activity creates a conflict of interest. However, clients are under no obligation to purchase tax and accounting services through Sage.

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

Sage receives additional compensation as a result of his other business activities disclosed in Item 4 above but does not otherwise receive any economic benefit for investment advisory or investment-related services beyond his role at Forum. Please also 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:

Allison Tronnes

Chief Compliance Officer
(630) 873-8512

atronnes@forumfinancial.com

Nikki Hopson

Advisor Development and Supervision
(630) 376-4367

nhopson@forumfinancial.com

Appendix

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/>.

Enrolled Agent (EA)

An Enrolled Agent (EA) is a tax professional authorized by the United States government to represent taxpayers in matters regarding the Internal Revenue Service (IRS). EAs may become credentialed in two different ways: (i) with five years of IRS experience regularly interpreting tax regulations, or (ii) through the successful completion of the three-part Special Enrollment Exam (SEE). EA candidates must also pass a background check before they are granted the EA status. To maintain the EA status, individuals must adhere to ethical standards and complete 72 hours of continuing education every three years. For more information, refer to the IRS website at: <https://www.irs.gov/tax-professionals/enrolled-agents/enrolled-agent-information>.