



**Form ADV Part 2B
Brochure Supplement**

Michael William Kite

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Item 1 – Cover Page

This Brochure Supplement provides information about Michael William Kite 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 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 Michael William Kite 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: Michael William Kite

Individual CRD #: 5897225

Born: 1983

Education Background:

- John Marshall Law School: Juris Doctor (JD) – 2009
- University of Illinois: Bachelor of Arts (BA), History – 2005

Business Experience:

- Williams & Kite, LLC: Partner and Attorney – 1/2019 to Present
- Forum Financial Management, LP: Investment Adviser Representative – 1/2012 to Present
- Pinnacle Wealth Management LLC: Member – 10/2011 to Present
- Purshe Kaplan Sterling Investments, Inc.: Registered Representative – 6/2011 to Present
- Faermark & Williams: Associate Attorney – 2/2012 to 12/2018

Professional Designations, Certifications, and Exams:

- Securities Industry Essentials® (SIE®) Exam, 2018
- General Securities Representative Examination (Series 7 Exam), 2011
- Uniform Combined State Law Exam (Series 66 Exam), 2011
- Juris Doctor (JD), 2009

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

Item 3 – Disciplinary Information

Michael has no reportable legal or disciplinary history.

Item 4 – Other Business Activities

Michael is a Partner and Attorney with Williams & Kite, LLC (Williams & Kite), providing estate planning and commercial, real estate, and corporate legal services. This activity accounts for approximately 35% of his time. He is also a Registered Representative of Purshe Kaplan Sterling Investments, Inc. (PKSI), selling investment products. This activity accounts for approximately 20% of his time. Additionally, he is a Member of Pinnacle Wealth Management, LLC (Pinnacle), providing investment advice and selling investment products. This activity accounts for approximately 20% of his time. Furthermore, he is an independent insurance agent, selling insurance products. This activity accounts for approximately 10% of his time.

Clients of Williams & Kite, PKSI, Pinnacle, or Michael in these business activities could also be clients of Forum Financial Management, LP. The compensation received by Michael in these capacities is separate and apart from the fees clients pay Forum for advisory services. Additionally, Michael could be eligible to receive other types of incentive awards offered by PKSI and he could receive 12b-1 fees from mutual funds that pay such fees. Clients should be aware that the receipt of additional compensation by Michael in these

outside business activities creates a conflict of interest. However, clients are under no obligation to purchase services or products through Michael.

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

Michael 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 these roles. 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:

Nikki Hopson

Advisor Development and Supervision
(630) 376-4367
nhopson@forumfinancial.com

Allison Tronnes

Chief Compliance Officer
(630) 873-8512
atronnes@forumfinancial.com

Appendix

General Securities Representative Examination (Series 7 Exam)

The General Securities Representative Examination (Series 7 exam) is an industry exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 125 scored questions. The exam assesses the competency of an entry-level registered representative to perform their job as a general securities representative and measures the degree to which each candidate possesses the knowledge needed to perform the critical functions of a general securities representative, including sales of corporate securities, municipal securities, investment company securities, variable annuities, direct participation programs, options and government securities. Candidates must pass the Securities Industry Essentials (SIE) exam and the Series 7 exam to obtain the General Securities Representative registration. For more information, refer to the FINRA website at: <https://www.finra.org/registration-exams-ce/qualification-exams/series7>.

Juris Doctor (JD)

A Juris Doctor (JD) is a professional degree in law that equips individuals with the knowledge and skills necessary to practice law. It is typically earned after three years of full-time, graduate-level study at an accredited law school following completion of a bachelor's degree. Once an individual has completed their JD, they must pass the bar exam in the state where they intend to practice law. The bar exam is a comprehensive test that assesses a candidate's knowledge of legal concepts, analytical skills, and ability to apply the law in real-world scenarios. Additionally, prospective lawyers must meet other requirements, such as completing a character and fitness evaluation, to be admitted to the bar and become licensed to practice law. Further, most states also require periodic continuing education in order to maintain licensure.

Securities Industry Essentials® (SIE®) Exam

The Securities Industry Essentials® (SIE®) Exam is an exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 75 multiple choice questions. Candidates have 75 minutes to complete the exam. In order for a candidate to pass the SIE® Exam, the individual must correctly answer 70 of the 75 scored questions. For more information, refer to the FINRA website at: <https://www.finra.org/registration-exams-ce/qualification-exams/securities-industry-essentials-exam>.

Uniform Combined State Law Exam (Series 66 Exam)

The Uniform Combined State Law Exam (Series 66 exam) is a North American Securities Administrators Association (NASAA) exam administered by the Financial Industry Regulatory Authority, Inc. (FINRA). The exam consists of 100 scored questions. Candidates have 150 minutes to complete the exam. In order for a candidate to pass the Series 66 exam, the individual must correctly answer at least 73 of the 100 scored questions. For more information, refer to the NASAA website at: <https://www.nasaa.org/exams/>.