

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Robert T. Methven

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This brochure supplement provides information about Robert Thomas Methven that supplements the Forum Financial Management, LP brochure. You should have received a copy of that brochure. Please 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 Robert Thomas Methven is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Robert T. Methven

Born: 1961

Education Background:

- University of Canterbury, LLB Degree, Law, 1984.
- University of Canterbury, B. Comm Degree, Finance, 1987.

Business Experience:

- Forum Financial Management, LP, Partner, 07/2007 to Present.
- F.A.M., LLC, Member, 01/2014 to Present.
- Genworth Financial Securities Corporation, Registered Representative, 07/2007 to 02/2011.
- Genworth Financial Advisers Corporation, Investment Adviser Representative, 07/2007 to 08/2009.
- Capital Brokerage Corp., President, 05/2002 to 06/2007.
- Genworth Financial Securities, CEO, 05/2002 to 02/2007
- Hochman & Baker, President, 01/2004 to 09/2004.
- GE Investment Distributors, CFO, 10/1997 to 05/2002.

Designations/Certifications:

Robert T. Methven has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- NASAA Series 65, Uniform Investment Advisor Law Examination, 2003.
- NASAA Series 63, Uniform Securities Agent State Law Examination, 2007.
- Licensed Insurance Agent (Life, Health, Disability, LTC).

Item 3 Disciplinary Information

Robert T. Methven has no reportable disciplinary history.

Item 4 Other Business Activities

Robert T. Methven is also a Member of Methven Business Services, LLC. and an independent insurance agent. Clients of Methven Business Services, LLC and 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 you pay our firm for advisory services. Mr. Methven's outside business activities present a conflict of interest because Mr. Methven may have an incentive to recommend tax and insurance services to you for the purpose of generating fees. Mr. Methven spends 10% of his professional time as Member of Methven Business Services, LLC, and an insurance agent.

Please refer to Part 2A of Form ADV: Firm Brochure, Item 10, Other Financial Industry Activities and Affiliations, for complete disclosure of the above referenced Investment-Related Activities.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Methven's receipt of additional compensation as a result of his activities as a Member of Methven Business Services LLC and an independent insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Forum Financial Management, LP's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Forum has implemented a Code of Ethics and an internal compliance program that guides each associated person in meeting their fiduciary obligations to clients. Advice provided to clients is directed by Forum's investment philosophy. The firm monitors the advice given to Forum's advisory clients by its advisors in the following ways:

1. an initial review of the asset allocation for a new client as compared to the client's risk tolerance and investment objectives;
2. periodic reviews of a random number of the advisor's client files in order to provide reasonable assurance that the advice provided by the advisor to his or her clients is consistent with the client's stated investment objectives and Forum's policies and procedures, and
3. in-person or telephonic meetings with advisors to review client activity. Moreover, on at least an annual basis, Forum offers training to each of its advisors to cover investments, new products, and related compliance concerns.

Robert T. Methven is supervised by Faye H. Nybo, Director of Supervision. Ms. Nybo can be reached at (630) 873-8503 or fnybo@forumfin.com.