

FORM ADV PART 2B  
BROCHURE SUPPLEMENT

**Megan E. Martin**

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This brochure supplement provides information about Megan Elizabeth Martin that supplements the Forum Financial Management, LP brochure. You should have received a copy of that brochure. Contact us at 630-873-8515 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 Megan Elizabeth Martin (CRD # 5971855) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name: Megan Elizabeth Martin**

**Born:** 1984

### **Education Background:**

- University of Michigan, BA, Spanish, 2006.

### **Business Experience:**

- Forum Financial Management, LP, Investment Adviser Representative, 01/2019 - Present.
- Forum Financial Management, LP, Client Service Associate, 02/2011 - Present.
- AGT Tax & Insurance Services, Senior Account Executive/Sales Support Coordinator, 01/2008 - 02/2011.
- TCF Bank, Shift Supervisor, 05/2005 - 12/2007.

### **Designations/Certifications:**

Megan E. Martin has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Series 65 - Uniform Securities Agent State Law Examination; NASAA; 2019.
- Licensed Insurance Agent (Life), 2009.

## Item 3 Disciplinary Information

Megan Elizabeth Martin has no reportable disciplinary history.

## Item 4 Other Business Activities

Megan E. Martin is not actively engaged in any other business or occupation (investment-related or otherwise) beyond her capacity as Investment Adviser Representative of Forum Financial Management, LP. Moreover, Ms. Martin does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

## Item 5 Additional Compensation

Megan E. Martin does not receive any additional compensation beyond that received as an Investment Adviser Representative and Client Service Associate of Forum Financial Management, LP.

## 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.

Megan E. Martin is supervised by Faye H. Nybo, Director of Supervision. Ms. Nybo can be reached at (630) 873-8503 or [fnybo@forumfin.com](mailto:fnybo@forumfin.com).