

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Michael W. Kite

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This brochure supplement provides information about Michael William Kite 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 Michael William Kite is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Michael W. Kite

Born: 1983

Education Background:

- The John Marshall Law School, Juris Doctor, 2009.
- University of Illinois, Bachelor of Arts, History, 2005.

Business Experience:

- Forum Financial Management, LP, Investment Advisor Representative, 1/2012 to Present.
- Purshe Kaplan Sterling Investments, Registered Representative, 6/2011 to Present.
- Pinnacle Wealth Management, LLC, Member, 9/2011 to Present.
- Faermark & Williams, LLC, Attorney, 2/2012 to Present.
- Pinnacle Wealth Management, LLC, Client Service Associate, 2/2011 to 9/2011.
- Colky & Kirsh, LLC, Associate Attorney, 6/2010 to 1/2011.
- Synergy Legal Professionals, Contract Attorney, 8/2009 to 1/2011.
- Knosher & Kite Attorneys at Law, Attorney, 1/2009 to 6/2010.

Designations/Certifications:

Michael W. Kite has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Series 7 - General Securities Representative 2011.
- Series 66 - Uniform Securities Agent and Investment Adviser Representative 2011.
- Juris Doctor - The John Marshall Law School 2009.
- Admitted to Practice Law in the State of Illinois 2009.

Item 3 Disciplinary Information

Michael W. Kite has no reportable disciplinary history.

Item 4 Other Business Activities

Michael W. Kite is a registered representative with Purshe Kaplan Sterling Investments (PKSI), Member FINRA/SIPC. In this capacity, Mr. Kite may recommend securities and/or insurance products offered by PKSI as part of your investment portfolio. If clients purchase these products through Mr. Kite, he will receive the customary commissions in his separate capacity as a registered representative of PKSI. Additionally, Mr. Kite may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Kite an incentive to recommend investment products based on the compensation received. 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.

Michael W. Kite is also an associate attorney at Faermark & Williams, LLC, Member of Pinnacle Wealth Management LLC and is separately licensed as an insurance producer or broker for one or more insurance companies. Clients of Mr. Kite may also be clients of Forum Financial Management, LP. The fees earned by Mr. Kite in his outside business activities are separate and apart from the fees you pay our firm for advisory services. Mr. Kite's outside business activities present a conflict of

interest because Mr. Kite may have an incentive to recommend legal and insurance services to you for the purpose of generating fees. Mr. Kite spends 90% of his professional time as an attorney, insurance agent and registered representative.

Please refer to 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. Kite's receipt of additional compensation as a result of his activities as a registered representative of PKSI, Attorney at Faermark & Williams, LLC, Member of Pinnacle Wealth Management LLC and 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.

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