

Item 1 – Cover Page



**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Brandon Lee Meyer

Office Address

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Telephone: (209) 267-2116

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The home office of Forum Financial Management, LP is located at 1900 South Highland Avenue, Suite 100, Lombard, IL 60148. Telephone: (630) 873-8520. Website: www.forumfinancial.com.

This brochure supplement provides information about Brandon Lee Meyer that supplements the Forum Financial Management, LP (“Forum”) Form ADV Part 2A Brochure (“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.

Additional information about Brandon Lee Meyer 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: Brandon Lee Meyer

Individual CRD #: 7797514

Born: 1981

Education Background:

- Humphrey College: Juris Doctor (JD) – 2010
- San Diego State University: Bachelor of Science (BS), Psychology – 2005

Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 2/2024 to Present
- MeyerPink Law, LLP: Owner and Attorney – 4/2022 to Present
- MP Capital Management, Inc.: Chief Executive Officer – 8/2023 to 2/2024
- Tuolumne Me-Wuk Tribal Council: General Counsel – 5/2005 to 4/2022

Professional Designations, Certifications, and Exams:

- Uniform Investment Adviser Law Examination (Series 65 Exam), 2023
- Juris Doctor (JD), 2010

Please refer to Part 2B Appendix 1 for definitions of the above.

Item 3 – Disciplinary Information

Mr. Meyer has no reportable legal or disciplinary history.

Item 4 – Other Business Activities

Mr. Meyer is an Owner of and Attorney with MeyerPink Law, LLP, which accounts for approximately 75% of his time. Clients of MeyerPink Law, LLP or Mr. Meyer in this business activity could also be clients of Forum Financial Management, LP. The fees earned by Mr. Meyer in this capacity are separate and apart from the fees clients pay Forum for advisory services. Clients should be aware that the receipt of additional compensation by Mr. Meyer in this outside business activity creates a conflict of interest. However, clients are under no obligation to purchase legal services through Mr. Meyer. As a fiduciary, Mr. Meyer has certain legal obligations, including the obligation to act in the clients' best interests.

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

Refer to the Other Business Activities section above for disclosures on Mr. Meyer's receipt of additional compensation as a result of his other business activities.

Also, please 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

Item 7 – Part 2B Appendix 1

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.

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/>.