



**Form ADV Part 2B  
Brochure Supplement**

**Jeffrey Jay Bogdanovich**

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**Item 1 – Cover Page**

This Brochure Supplement provides information about Jeffrey Jay Bogdanovich 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 of the Firm Brochure at [www.forumfinancial.com](http://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 Jeffrey Jay Bogdanovich is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

**Full Legal Name:** Jeffrey Jay Bogdanovich  
**Individual CRD #:** 3168177  
**Born:** 1958

### Education Background:

- University of Washington: Bachelor of Arts (BA), Accounting – 1981

### Business Experience:

- Forum Financial Management, LP: Investment Adviser Representative – 11/2024 to Present
- Bogdanovich Wealth Management, PLLC: Sole Member – 1/1996 to Present

### Professional Designations, Certifications, & Exams:

- Personal Financial Specialist (PFS™), 2006
- Certified Public Accountant (CPA), 1983

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

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## Item 3 – Disciplinary Information

Jeffrey has no reportable legal or disciplinary history.

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## Item 4 – Other Business Activities

Jeffrey is the Sole Member with Bogdanovich Wealth Management, PLLC, providing tax preparation and investment advisory services. Bogdanovich Wealth Management, PLLC, an SEC registered investment advisory firm is in the process of transitioning all of its existing client relationships to Forum. Bogdanovich Wealth Management, PLLC, anticipates that it will withdraw registration and no longer provide investment advisory services once the transition is complete. Accordingly, Jeffrey, will refer clients to Forum, so those clients can continue to receive advisory services after Bogdanovich Wealth Management, PLLC withdraws its registration. This recommendation presents a conflict of interest, to the extent that Jeffrey receives a direct or indirect economic benefit from any such referral. Jeffrey and Bogdanovich Wealth Management, PLLC mitigate this conflict by reminding clients that they are not under any obligation to engage Forum to provide services. However, clients who ultimately decline to transition their relationships to Forum will not be able to receive ongoing advisory services from Jeffrey after the transition to Forum is complete and Bogdanovich Wealth Management, PLLC withdraws its registration. Except as

described above, Jeffrey is not actively engaged in any other investment-related businesses or occupations.

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.

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## Item 5 – Additional Compensation

Jeffrey 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 his role at Forum. 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.

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## 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:

**Allison Tronnes**

Chief Compliance Officer  
(630) 873-8512

[atronnes@forumfinancial.com](mailto:atronnes@forumfinancial.com)

**Nikki Hopson**

Advisor Development and Supervision  
(630) 376-4367

[nhopson@forumfinancial.com](mailto:nhopson@forumfinancial.com)

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## Appendix

### Certified Public Accountant (CPA)

The Certified Public Accountant (CPA) is a professional designation for licensed accounting professionals. CPAs are licensed and regulated by their state Boards of Accountancy. While state laws and regulations vary, the education, experience, and testing requirements for licensure as a CPA generally include: a bachelor's degree in business administration, finance, or accounting, in addition to having completed 150 hours of education; a minimum of two years of public accounting experience; and successful passage of the Uniform CPA Examination® ("CPA Exam"). The CPA Exam comprises four sections: auditing and attestation, business environment and concepts, financial accounting and reporting, and regulation.

In order to maintain a CPA designation, states generally require completion of continuing professional education (hourly requirements vary by state). Additionally, all American Institute of Certified Public Accountants (AICPA) members must adhere to a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own. For more information, refer to the AICPA website at: <https://www.aicpa.org/home>.

### Personal Financial Specialist (PFS™)

The Personal Financial Specialist (PFS™) is a professional certification for Certified Public Accountants (CPAs) awarded by the American Institute of Certified Public Accountants (AICPA). The PFS™ certification allows CPAs to expand their expertise and offerings to include financial planning and wealth management.

The following requirements for the Personal Financial Specialist (PFS™) must be met:

- Maintain AICPA membership in good standing;
- Hold a valid and unrevoked CPA certificate issued by a state authority; and
- Complete the following education and experience, dependent upon the chosen pathway:
  - For the Standard pathway, earn a minimum of 75 hours of PFP continuing professional development within the five years preceding your PFS™ application.

- For the Certificate pathway, gain education on the PFP Body of Knowledge in five (5) certificates. Each certificate includes 3-5 online, on-demand modules, each totaling 20-33 hours of CPE credits.
- For the Experienced pathway, earn a minimum of 105 hours of PFP continuing professional development within the seven years preceding the PFS application.
- For the Standard and Certificate pathways, within the five years preceding the PFS™ application, complete two years of full-time business or teaching experience (or 3,000 hours equivalent) in personal financial planning or, for candidates in academia, a qualified credential holder should be a full-time professor and have taught at least four accredited college courses with 50% of their material included in the PFS Body of Knowledge.
- For the Experienced pathway, within the seven years preceding the PFS™ application, complete five years of full-time business experience (or 7,500 hours equivalent) in personal financial planning.
- Pass the relevant PFS™ Exam for the corresponding pathway.

A PFS™ professional is required to adhere to AICPA's Code of Professional Conduct and must complete 20 hours (or its equivalent) of continuing professional education annually. For more information, refer to the AICPA website at: <https://www.aicpa-cima.com/membership/landing/personal-financial-specialist-pfs-credential>.