

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

Joseph M. DeMarco

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This brochure supplement provides information about Joseph M. DeMarco 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 Joseph M. DeMarco is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Joseph Michael DeMarco

Born: 1973

Educational Background:

- University of Illinois at Champaign/Urbana, BA, Accounting, 1995

Business Experience:

- Forum Financial Management, LP, Investment Adviser Representative, 01/2018 to Present
- DeMarco Sciacotta Wilkens & Dunleavy, LLP, Partner, 10/2009 to Present
- DeMarco Consulting, Owner, 10/2007 to 10/2009

Designations/Certifications:

Joseph DeMarco has earned the following designation(s)/certification(s) and is in good standing with the granting authority:

- Certified Public Accountant (CPA), 2008
- NASAA Series 65 - Uniform Investment Advisor Law Examination, 2018

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

Item 3 Disciplinary Information

Joseph Michael DeMarco has no reportable disciplinary history.

Item 4 Other Business Activities

Joseph Michael DeMarco is a partner of DeMarco Sciacotta Wilkens and Dunleavy, LLP, a certified public accounting firm. Clients of our firm may also be clients of DeMarco Sciacotta Wilkens and Dunleavy, LLP. The services provided and compensation received by Mr. DeMarco and DeMarco Sciacotta Wilkens and Dunleavy, LLP for accounting related activities are separate and distinct from any fees paid for advisory services provided by our firm. While we believe that Mr. DeMarco's fees are competitive, such fees may be higher than those charged by other firms providing the same or similar services. Mr. DeMarco allocates approximately 90% of his professional time as partner of DeMarco Sciacotta Wilkens and Dunleavy, LLP.

Item 5 Additional Compensation

Please refer to the Other Business Activities section above for disclosures on Mr. DeMarco's receipt of additional compensation as a result of his activities as a partner at DeMarco Sciacotta Wilkens & Dunleavy.

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.

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

Item 7 Part 2B Appendix 1

Certified Public Accountant (CPA) - CPA's 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 minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow 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.