FORUM Solutions Group, LLC
dba FORUM Private Client Group

Relationship Summary

February 5, 2026

We are FORUM Solutions Group, LLC, doing business as FORUM Private Client Group, an investment adviser registered with the Securities and Exchange Commission. Investment advisory and brokerage services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at **Investor.gov/CRS**, which also provides educational materials about broker-dealers, investment advisers, and investing. Our firm and financial professionals' registration information are also publicly available on the **Investor.gov** website.

What investment services and advice can you provide me?

We offer customized investment advisory, consulting, financial planning, and selection of other advisers to retail investors. We offer advice on a full suite of securities, including equities, fixed income, mutual funds, ETFs, options, and similar investments. Our services are generally provided on a discretionary basis, which means that we have the power to buy and sell securities for your account without your prior consent. This authority is usually unlimited and remains in effect until you revoke it. We may provide non-discretionary investment advice, where we make investment recommendations to you and you decide whether to implement the recommendation. We do not give advice on any proprietary investment products.

We review portfolios at least annually. We monitor accounts on a continuous basis and conduct ad hoc reviews if you change your objectives or risk tolerance, upon significant market and economic events, or if we change our investment strategy as part of our standard service to you.

We require a minimum annual fee of $1,000. For portfolio values less than $80,000, clients may be able to obtain comparable services at a lower cost elsewhere. The minimum fee requirement can be waived in unique or special circumstances.

Please go to https://adviserinfo.sec.gov/firm/summary/143075 for additional information on our firm. Select PART 2 BROCHURES and reference Items 4, 7, and 8 of our Part 2A Brochure for additional information on our services, investment advice, and account requirements.

Other Questions You May Have

Given my financial situation, should I choose an investment advisory service? Should I choose a brokerage service? Should I choose both types of services? Why or why not?

How will you choose investments to recommend to me?

What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?

What fees will I pay?

Our quarterly fees are calculated as a percentage of the assets under our management, so our fees will rise and fall with the value of the assets we manage for you. As a result, we are economically incented to recommend that you place more assets in your account in order to increase the value of your portfolio, because as the value increases, so do our fees.

In addition to our fees, you will be charged transaction or asset-based fees by your custodian for its services. These fees vary depending on the custodian. Under a transaction fee arrangement, the more transactions effected in your account, the more fees you will pay, and high activity in your account does not assure positive portfolio performance. For custodians that charge their fees based upon a percentage of your assets, such fees may be more than would be the case if you are charged a transaction-based fee. Please be mindful of the effect of your portfolio size, the level of activity, and the rate of custodian asset-based pricing. Generally, large portfolios would be disadvantaged by paying an asset-based custodian fee versus a transaction-based fee. Some securities carry additional costs, such as mutual funds and ETFs.

There are additional fees such as internal fees and expenses charged by mutual funds (i.e., 12b-1 distribution fees and management fees that are assessed within the mutual fund) and exchange-traded funds, product-level fees and commission for insurance-related products, postage and handling, transfer taxes, SEC fees for sales of securities. All fees have an adverse impact on the value of your portfolio over time. Financial planning fees will be charged at an hourly or fixed rate as agreed upon by you and the firm.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. **You can find more information about our fees and costs under Item 5 of our Part 2A Brochure, available at https://adviserinfo.sec.gov/firm/summary/143075.**

Other Questions You May Have

Help me understand how these fees and costs might affect my investments. If I give you $10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interests ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts, because they can affect the investment advice we provide you. Here are some examples to help you understand what this means.

- We are under common control with FORUM Credit Union, a federal credit union as well as a duly licensed insurance agency. We may recommend FORUM Credit Union to you to fulfill your banking and/or insurance needs. We also have a referral program where FORUM Credit Union will refer prospective advisory clients to our firm for compensation. This creates conflicts of interest in that there is an economic incentive to recommend the services of our affiliate and for our affiliate to recommend our services.
- Certain FORUM Private Client Group professionals are licensed to sell insurance and be compensated in the form of commissions, which creates conflicts of interest regarding compensation.

Additional information regarding conflicts of interest can be found in Items 5, 10, 11, and 12 of our Part 2A Brochure, available at https://adviserinfo.sec.gov/firm/summary/143075.

Other Questions You May Have

How might your conflicts of interest affect me, and how will you address them?

How do your financial professionals make money?

Our financial advisors are paid a fixed salary plus a percentage of the fees we collect from you. Our financial advisors may receive commission-based compensation for the sale of insurance-related products. We are incentivized to recommend that you add additional assets to your account. We do not receive non-cash compensation.

Do you or your financial professionals have legal or disciplinary history?

No. You can visit **Investor.gov/CRS** for a free and simple search tool to research our firm and financial professionals.

Other Questions You May Have

As a financial professional, do you have any disciplinary history? For what type of conduct?

You can find additional information about our investment advisory services on our Part 2A Brochure, available at https://adviserinfo.sec.gov/firm/summary/143075. You may contact us at 317-558-6322 or via email to pcg@forumcu.com if you have questions or to request a current copy of this Relationship Summary

Other Questions You May Have

Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?