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FOR IMMEDIATE RELEASE

**Boston Estate Planning Council to Honor David E. Appel, CLU, ChFC, AEP® with its Excellence Award
at May 19th Annual Virtual Gala**

WESTFORD, MASSACHUSETTS (FEBRUARY 24, 2021) – The Boston Estate Planning Council (BEPC), the definitive professional group of estate and wealth planners in Greater Boston, has selected David E. Appel, CLU, ChFC, AEP® to receive its highest honor, the BEPC Excellence Award. This award recognizes professional excellence in the area of estate planning and significant contributions to the community.

Appel will be honored by his peers at BEPC's Annual Gala to be held on in a virtual format on May 19th. The virtual event will be hosted by Jared Bowen, the Emmy-award winning Executive Arts Editor at WGBH. Bowen hosts the weekly television series, *Open Studio with Jared Bowen*. BEPC members, non-members, and their guests are invited to [attend the Annual Gala](#), registration opens the week of March 1st.

David E. Appel is managing partner at Appel Insurance Advisors, LLC. A 1992 graduate of the Whitman School of Management at Syracuse University, David concentrates his practice with a consultative, service-oriented approach to personal and business insurance planning. He assists clients with protecting their families and businesses from the financial pitfalls of death, disability, and the drain of long-term care expenses. He primarily focuses on supporting clients with tax-efficient wealth transfer goals, business succession, charitable planning, international clients obtaining U.S. based life insurance, and helping emerging wealth families establish and maintain their People Insurance™ portfolios. David has maintained a successful life insurance focused practice for over 28 years.

David was highlighted in the National Association of Insurance and Financial Advisors' (NAIFA) publication, "Advisor Today," in July 2004 in an article entitled "Four under Forty" portraying four top Advisors and community leaders in the United States under the age of 40.

David was the past president of NAIFA Boston, and served on the NAIFA-Massachusetts Board. He is one of a few Licensed Insurance Advisors in the Commonwealth of Massachusetts. He holds the Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), and Accredited Estate Planner® (AEP®) designations. Recognized nationally, David has spoken at life insurance industry meetings

internationally and throughout the United States, as well as being regularly published in a variety of national industry publications.

David is actively involved with several philanthropic organizations.

David spends time between Newton, Massachusetts and Bridgton, Maine with his fiancé Kira and their blended family which is comprised of eight children.

BEPC Annual Gala

BEPC's Annual Gala celebrates the Excellence Award recipient, the President's Award recipient, and the transition of the Council's president. This year's virtual gala offers attendees a wide selection of experiential sessions throughout the evening, including charcuterie board creation, chocolate tasting, and a mentalist. The event also provides excellent opportunities to network with BEPC members and guests.

The evening's activities are underwritten by BEPC's generous sponsors:

- [Day Pitney LLP](#), Platinum Annual Gala Sponsor
- [The Boston Foundation](#), Gold Annual Gala Sponsor
- [Burns & Levinson LLP](#), Gold Annual Gala Sponsor
- [DGC \(DiCicco, Gulman & Company\)](#), Gold Annual Gala Sponsor
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About BEPC

The Boston Estate Planning Council (BEPC) is a multi-disciplinary community of over 700 estate and wealth planning professionals. The Council provides educational programs and networking opportunities to help its members build and strengthen relationships, learn about ideas and strategies, and share thought leadership.

The Boston Estate Planning Council is one of the oldest and largest interdisciplinary estate planning councils in the country, tracing its roots back to 1930. The Council is an active affiliate of the National Association of Estate Planners & Councils (NAEPC). BEPC has been honored by NAEPC as a 5-Star Council each of the last three years (2018 to 2020) and received the Council of Excellence Award in the prior three years (2015 to 2017). More information is available at <http://www.bepc.org>.

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