



# APPEL INSURANCE ADVISORS LLC

**DAVID E. APPEL** CLU, ChFC, AEP®

Managing Partner  
david@appeladvisors.com

Please provide the following so we can calculate the proper amount of life insurance for your family.

Client #1 _____	Client #2 _____
Date of Birth _____	Date of Birth _____
Best Email Address: _____	Best Email Address: _____
Home Address: _____	
Home # _____	Work#1 _____
Cell #1 _____	Work #2 _____
Cell#2 _____	

**Educational Funding for children** (Indicate either **Private** School or **Public** by child and grade level.)

Child's Name	Birth Date	Grade as of Next Sept	Grade K-4	Grade 5-8	Grade 9-12	4 years College	Graduate School
Example	01-02-1988	2	public	public	private	private	no

**Home Value/Mortgage Balance / Real Estate Taxes** \$ \_\_\_\_\_ / \$ \_\_\_\_\_ / \$ \_\_\_\_\_

**Other major debt** \$ \_\_\_\_\_

**Spendable (after tax) income** desired for the family (exclusive of schooling and mortgage) to maintain current standard of living: \$ \_\_\_\_\_/month

**Financial support to other family members** \$ \_\_\_\_\_/month for \_\_\_\_/years

**Client #1 / Client#2 Earned Income** \$ \_\_\_\_\_/year \$ \_\_\_\_\_/year

**Assets currently available to produce income for the family**

Total Personal Life Insurance \$ \_\_\_\_\_ / \_\_\_\_\_

Group Life Insurance \$ \_\_\_\_\_ / \_\_\_\_\_

Stocks/Bonds/Mutual Funds \$ \_\_\_\_\_

Other liquid investments \$ \_\_\_\_\_

Retirement Plan (401(k) etc.) \$ \_\_\_\_\_

IRAs \$ \_\_\_\_\_

Attorney \_\_\_\_\_ CPA \_\_\_\_\_ Investment Firm \_\_\_\_\_

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One Gateway Center, Suite 915, Newton, MA 02458 TEL (617) 332-7900 FAX (617) 904-2684 [www.AppelAdvisors.com](http://www.AppelAdvisors.com)

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