



**APPEL** INSURANCE  
ADVISORS LLC

**DAVID E. APPEL** CLU, ChFC, AEP®

*Managing Partner*

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**APPEL INSURANCE ADVISORS, LLC  
EXISTING INSURANCE INFORMATION**

Name of Insured(s) \_\_\_\_\_

Insurance Carrier \_\_\_\_\_

Policy # \_\_\_\_\_

Policy Date \_\_\_\_\_

Face Amount \_\_\_\_\_

Premium \_\_\_\_\_

Please check:          Permanent Insurance          Term Insurance \_\_\_\_\_ year term

Please check:          Individual Insurance          Second to Die Insurance          Business Insurance

Owner \_\_\_\_\_

Beneficiary \_\_\_\_\_

**Trust Information (if applicable)**

Name of Trust \_\_\_\_\_

Date of Trust \_\_\_\_\_

Tax Identification Number (TIN or EIN) \_\_\_\_\_

Address of Trust \_\_\_\_\_

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

ESTATE PLANNING STRATEGIES | CORPORATE & EXECUTIVE BENEFITS | LIFE, DISABILITY, GROUP & LONG TERM CARE INSURANCE | ANNUITIES | MA LICENSED INSURANCE ADVISOR

SECURITIES OFFERED THROUGH ROYAL ALLIANCE ASSOCIATES, INC. (RAA), MEMBER FINRA/SIPC.  
RAA IS SEPARATELY OWNED AND OTHER ENTITIES AND/OR MARKETING NAMES, PRODUCTS OR SERVICES REFERENCED HERE ARE INDEPENDENT OF RAA.



**APPEL** INSURANCE  
ADVISORS LLC

Trustee(s) Name \_\_\_\_\_

Trustee Address \_\_\_\_\_

Trustee Phone Number \_\_\_\_\_

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