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Integrated Insurance Solutions Acquires Appel Insurance Advisors, Expanding Advanced Planning Capabilities for Financial Advisors Nationwide

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Acquisition strengthens sophisticated insurance expertise for Integrated advisors, Appel clients and independent RIA firms outside the Integrated network

BOSTON--([BUSINESS WIRE](#))--Integrated Insurance Solutions, a specialized insurance consulting and planning firm, today announced the acquisition of [Appel Insurance Advisors, LLC](#), bringing together two highly experienced teams to deliver sophisticated life insurance, disability income protection, long-term care, estate and business planning strategies for financial advisors across the country.

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"This is about bringing together two complementary perspectives to better support advisors and their clients," said **Peter Kaplan**, executive vice president and head of planning and insurance solutions at Integrated Partners. "As client circumstances become more complex, advisors need deeper expertise and a more integrated approach to risk management. That's exactly what this platform delivers."

Appel's practice has long been recognized for its technical depth and relationship-driven approach across life insurance, executive benefits, disability income protection, estate planning, and long-term care. His addition enhances Integrated Insurance Solutions' ability to collaborate across an advisor's full planning team, and help elevate outcomes through deep coordination.

"This partnership allows us to expand what we can deliver without changing how we serve," said **Appel**. "We've always believed insurance planning should be thoughtful, educational, and fully aligned with a client's broader financial strategy. Now, we can bring that approach to more advisors while continuing to support the relationships we've built over the years."

Integrated Insurance Solutions will continue to support **Integrated Partners** advisors, Appel's existing clients, and independent advisors and RIAs nationwide, particularly those who lack in-house insurance planning capabilities but need to address increasingly sophisticated client demands.

Advisory firms interested in learning more about Integrated Insurance Solutions and Integrated Partners' broader capabilities are encouraged to visit **Integrated Partners**.

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including technology, investment management, advanced planning, CPA partnerships, marketing, succession planning and consulting support.

With more than 220 advisors and 250+ CPA partners nationwide, Integrated supports advisors through a foundation of empowerment, integrity and trust.

Investment advice offered through Integrated Partners, a registered investment advisor. \$25 billion in assets under advisement, including \$18.9 billion in advisory assets as of 12/31/25.

About Appel Insurance Advisors, LLC

Appel Insurance Advisors is an insurance advisory practice founded by David Appel focused on advanced planning strategies for advisors, business owners, and high-net-worth and ultra-high-net-worth clients.

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Integrated Partners Adds \$850 Million City Square Wealth Management, Expanding Greater Boston Presence

BOSTON--([BUSINESS WIRE](#))--Integrated Partners ("Integrated"), a national financial planning and registered investment advisory (RIA) firm serving more than \$25 billion in assets under advisement (AUA), today announced that City Square Wealth Management ("City Square") has...

Integrated Partners Adds SIGIL Family Office, Strengthening Services for Ultra High-Net-Worth Clients

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