Our Wealth Management\Retirement Income Planning Team

Administrative Assistant:

Andrea Lanzendorfer - Andrea joined Capital Analysts in December of 2022. She graduated from Lasell College with a degree in Business Management. Andrea assists Brian in all areas of client service and administration. She currently lives in Braintree, MA with her husband Neil and their son Ryan.

Estate and Business Planning:

Christopher M. Duffy, J.D., - Chris is our managing partner and staff attorney specializing in estate planning. He is a graduate of the University of Vermont and Brooklyn Law School, and is licensed to practice law in the states of Massachusetts, New York, and New Jersey. Chris helps our clients develop well thought out estate and business planning strategies in coordination with the overall financial plan.

**Legal services are not offered through, or supervised by, Lincoln Investments or Capital Analysts.*

Investment Operations and Technology

Paul Longobardi – Paul joined Capital Analysts of New England in November of 2020 as Senior Director of Investments. Among his 25 years of experience, he has previously worked at TD Private Client Group and US Trust as a portfolio manager and has additional wealth management experience from various roles at Columbia Management and Fidelity Investments. Paul has earned his MBA from Babson and a bachelor's degree in Finance from Villanova. In addition, Paul has earned the CFP® certification, CAIA designation, and the Series 7 and 66 registrations.

Paul works with our advisors to provide recommendations for portfolio allocations, account rebalancing and other portfolio adjustments and also provides investment research and analysis. In addition, he maintains wholesaler relationships and organizes advisor meetings.

On a personal note, Paul lives with his wife Kristin and three sons in Wrentham, Massachusetts. He and family are avid soccer and lacrosse fans and love to travel.

Investment Operations and Technology:

Alexa Muscillo - Alexa has been with Capital Analysts of New England, Inc. since 2007 when she started out in office administration. She now oversees the investment operations while providing knowledge and communication to the advisors on investment procedures. Additionally, she provides support with the office technology. She is currently attending Bridgewater State University and anticipates receiving her Bachelor of Science in accounting in May 2016.

Life Insurance & Long Term Care Insurance Design and Underwriting:

Lawrence A. Whalen II- Larry joined Capital Analysts in January 1996. He has served in a number of positions and is currently in our accounting and information management areas. He holds a Bachelor's Degree in Business Administration from the University of Rhode Island. Larry also has an insurance license in Massachusetts.

Investment Management and Research Team:

Steve Mayhew, Chris Surrichio , Brian Moran- The Investment Management and Research (IM&R) team is an essential part of the Capital Analysts Wealth Management Services platform. This group provides extensive proprietary research, oversight of a variety of asset management programs, and due diligence for a broad spectrum of products you need for affluent clients. The highly credential team members also provide investment planning support.

** This team is located in Fort Washington, PA*