WEALTH MANAGEMENT TEAM

Client Relations Manager:

April Cabral- April is a graduate of the University of Massachusetts- Dartmouth with a bachelor's degree in Business Management. April has over 16 years of experience assisting Jerry in all areas of client services and administration. She currently resides in Somerset, MA with her husband Trevor and their two children Quinn and Colin.

Estate and Business Planning:

Christopher M. Duffy, J.D., CFP®-Chris 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. As our staff attorney, Chris develops comprehensive estate and business planning strategies that coordinate with our clients overall financial plan. Chris resides in Milton, MA with his wife Gretchen and their two children Caroline and Joe.
*Legal services are not offered through, or supervised by, Lincoln Investment or Capital Analysts.

Investment Management and Research Team*:

Steve Mayhew, CFA, Chris Surrichio, CFA, Brian Moran, CFA, - The Capital Analysts 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 individual securities, asset management programs, and due diligence for a broad spectrum of products. These highly credentialed team members provide investment planning support.
*Located in Fort Washington, PA.

Investment Operations and Technology:

Alexa Muscillo- Director of Operations and Technology- 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 attended Bridgewater State University and received her Bachelor of Science in accounting in 2016.

Life Insurance & Long-Term Care Insurance Design and Underwriting:

Lawrence A. Whalen II- Director of Advisor Relation and Insurance Operations- Larry has been in the insurance industry since 1988 and joined Capital Analysts of New England, Inc. in January 1996. He holds a Bachelor's Degree in Business Administration from the University of Rhode Island. Larry has experience and knowledge in many areas of operations within the organization. His focus is helping advisors with providing life, long-term care and other insurance solutions for their clients.

Retirement Income Planning/ Financial Modeling:

Ryan Carlin, Director of Financial Planning and Investments-Ryan joined Capital Analysts of New England, Inc. in 2016 as the Director of Financial Planning and Investments. Ryan holds a bachelor's degree in Finance from Penn State University, is a Chartered Retirement Planning Counselor℠, and holds his Series 66 & 7 registrations. In his role, Ryan provides fund and allocation recommendations to our independent advisors, monitors and vets existing and future mutual fund and investment partners, stays up to date on the latest developments within the financial advisory industry, performs as-needed research on varied financial planning topics, and helps craft financial plans on behalf of the advisors he works with.