

Wealth Management Team

Administrative Assistant:

April Cabral- April is a graduate of the University of Massachusetts-Dartmouth with a bachelor's degree in Business Management. April has over 17 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. April dedicates her spare time working closely with the Jimmy Fund and raising funds and awareness for Breast Cancer research.

Bridget Robinson, AIF®, CFS®:

Bridget is both series 7 and series 66 registered. She holds the AIF® designation as an Investment Fiduciary®, as well as, the Certified Fund Specialist, CFS® designation. Bridget also holds producer licenses for Health, Life, Variable and Long-Term Care Insurance. She is a cum-laude graduate of the Peter T. Paul College of Business and Economics from the University of New Hampshire in Durham, NH. Bridget is enrolled in the College for Financial Planning to pursue the CERTIFIED FINANCIAL PLANNER™ certification. She currently resides in South Boston and is an avid Boston sports fan, traveler and concert attendee.

Patrick Robinson:

A graduate of Bryant University in Smithfield, Rhode Island, Patrick earned a Bachelor of Science in Business Administration with a concentration in Financial services. Upon graduating from Bryant University in 2014, Patrick relocated to Nashville, TN. Here he began his career at Jackson National working exclusively with Financial Advisors, assisting them in structuring guaranteed income products for their clients. In 2017, Patrick took on a new role with Mutual of America as a Retirement Plan Consultant covering West Tennessee, Northern Mississippi, and Eastern Arkansas. In this role he worked with both employers, in structuring the group retirement plans through plan design and amendments, and with employees through education on saving and investing. Most recently, in 2020, Patrick joined Capital Analysts of New England and spent 8 months working and training at our Broker/Dealer, Lincoln Investment in Fort Washington, PA. Here he gained knowledge and experience in leveraging technology to help clients establish, reach, and monitor their goals. Patrick holds his FINRA 6, 7, 63, and 66 registrations. He is currently enrolled in the College for Financial Planning while pursuing the CERTIFIED FINANCIAL PLANNER™ Certification. Patrick is a sports enthusiast, fan of music, and enjoys playing the guitar.

Estate and Business Planning:

Christopher M. Duffy, J.D.-Chris is our 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 assists Jerry in developing 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 Management and Research Team*:

Steve Mayhew, CFA, Chris Surrichio, CFA, Brian Moran, MBA - 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.

Investment Operations and Technology:

Alexa Muscillo- Alexa started her career with Capital Analysts of New England, Inc. in 2007. She quickly progressed through the ranks to become our Investment Operations and Technology Officer.

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

Lawrence A. Whalen II- A University of Rhode Island graduate, joined Capital Analysts in 1996. Larry has a diverse range of talents that have enabled him to excel in our accounting, insurance and information management systems department.

* This IM&R team is located in Fort Washington, PA