Our Wealth Management\Retirement Income Planning Team

Administrative Assistant:
April Cabral- April joined Capital Analysts in November of 2003. She graduated from the University of Massachusetts-Dartmouth with a degree in Business Management. April assists Brian in all areas of client service and administration. She currently lives in Somerset, MA with her husband Trevor and their two children.

Estate and Business Planning:
Christopher M. Duffy, J.D., CFP®-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.

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.

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 attended Bridgewater State University and received 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 Radnor, PA.