Wealth Management/Retirement Income Planning Team

Administrative Assistant:
Andrea Lanzendorfer - Andrea joined Capital Analysts of New England in December of 2022. She graduated from Lasell College with a bachelor's degree in Business Management. In her role, she supports Brian across all aspects of client service and administrative operations. Outside the office, Andrea enjoys quality time with her husband, Neil, and staying active with their son, Ryan.

Estate & Business Planning:
Christopher M. Duffy, J.D., AEP®, 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.
**Legal services are not offered through, or supervised by, Lincoln Investments or Capital Analysts*

Investments & Financial Planning:
Claire Keefe - Claire joined Capital Analysts of New England in 2025 with over 17 years of experience dedicated to partnering with Advisors on portfolio construction, investment due diligence, wholistic financial planning, and innovative Wealth Management solutions. Most recently, Claire served as the Head of Portfolio Solutions at Fiduciary Trust Company, where she led the portfolio analyst and trading division responsible for clients' customized investment accounts. Previously, Claire held senior investment and strategy roles at Morgan Stanley, Smith Barney, Hightower Advisors, AllianceBernstein (AB), and in the Wealth Management division of E*Trade for Morgan Stanley. Claire holds a bachelor's degree in Economics from Middlebury College and is a Chartered Financial Analyst level II candidate. Outside of work, Claire is passionate about childhood cancer fundraising and advocacy. She and her husband spend their spare time coordinating their children's many activities around the town of Needham, MA.

Investment Operations and Technology:
Alexa Muscillo - Alexa has been with Capital Analysts of New England, Inc. since 2007, beginning her career in office administration. Over the years, she has advanced to oversee investment operations, serving as a knowledgeable resource for advisors on investment procedures. She also plays a key role in supporting and managing the firm's office technology.

Life Insurance & Long-Term Care Insurance Design and Underwriting:
Lawrence A. Whalen, II - Larry joined Capital Analysts in January 1996 and has held a variety of roles throughout his tenure. He currently serves as the Director of Insurance Services for the firm. Larry holds a bachelor's degree in Business Administration from the University of Rhode Island and is licensed to sell insurance in Massachusetts.

Investment Management and Research Team at Lincoln Investment*:
Shashi Mehrotra, Chris Surrichio, Brian Moran and Jerry Burhop - 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 in Fort Washington, PA*