TEAM EXPERIENCE AND CREDENTIALS

Bridget Robinson- Registered Representative

Bridget is both a Registered Representative and an Investment Advisor representative as she is series 7 and series 66 licensed. 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 Designation (CFP®). She currently resides in Charlestown and is an avid Boston sports fan, traveler, and concert attendee.

Patrick Robinson, CFP® - Registered Representative

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 working exclusively with Financial Advisors, assisting in structuring guaranteed income products for their clients. In 2017, Patrick took on a new role as a Retirement Plan Consultant. In this role he worked with both employers, in structuring the group retirement plans through plan design, and with employees through education on saving and investing. Patrick joined Capital Analysts of New England in 2020 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 is a CERTIFIED FINANCIAL PLANNER™ professional and holds the FINRA 6, 7, 63, and 66 licenses. Patrick is a sports enthusiast, fan of music, and enjoys playing the guitar.

Andrea Lanzendorfer – Administrative Assistant:

Andrea is a graduate of Lasell College with a bachelor's degree in Business Management. Andrea has over ten years of experience in the property management and real estate industry and is excited to expand into the financial industry. Andrea joined Capital Analysts of New England in 2022 bringing reputable client and administration services. She currently resides in Braintree, MA with her husband Neil and their son, Ryan. Andrea enjoys spending time outdoors with her family and dog, traveling and trying new restaurants.

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.

TEAM EXPERIENCE AND CREDENTIALS

Investment Management and Research Team*:

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

Alexandra Mendoza – Alex brings with her a background in banking, customer service, and management. Alex supports the team through a myriad of administrative tasks to streamline operations. In her spare time, Alex likes to volunteer and is a member of the Boston Cares Organization.

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.

Investment and Market Support

Paul Longobardi is a graduate of Villanova University with a degree in Finance and a graduate of Babson College with an MBA. Paul has 30 years of investment experience, trading and portfolio management. Paul holds his FINRA 7 and 66 licenses as well as the Certified Financial Planner Designation (CFP®) and the Chartered Alternative Investment Analyst (CAIA) designation. Paul supports the team with investment research and portfolio and model analysis.

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