

MAINSTREET ADVISORS IS AN INVESTMENT ADVISORY FIRM DEDICATED TO SERVING WEALTH MANAGEMENT PROFESSIONALS WHILE HELPING CLIENTS WORK TOWARD THEIR INVESTMENT OBJECTIVES.

The firm provides portfolio management, investment research, and marketing support services. MainStreet Advisors maintains Portfolio Management Solutions to provide institutions the right tool for every client situation and to help increase efficiency. MainStreet Advisors cultivates and carefully sows the seeds of growth for fiduciaries around the country.



SARA RUSSEL, CSOP™, CFIRS™, CAMS, CTOP™
SENIOR OPERATIONS CONSULTANT

Sara joined the firm in 2017 and serves as a Senior Operations Consultant. In this role, she works closely with MainStreet Advisors' clients as a resource for evaluating trust accounting procedures, optimizing operational functionality, and consulting on compliance issues. Sara is also involved with the onboarding of new clients, as well as troubleshooting issues with trade files and data integrity. With more than 20 years of financial sector experience, Sara brings both industry experience and expertise to her role.

Prior to joining MainStreet Advisors, Sara served as Compliance and Trust Operations Officer for Harbour Trust Company in Indiana where she was responsible for updating the firm's policies and procedures with regard to BSA/AML, USA PATRIOT Act, OFAC and Information Security. In addition, Sara was the system administrator for the firm's trust accounting software modules.

- Valparaiso University, Bachelor of Science
- Certified Securities Operations Professional (CSOP), Institute of Certified Bankers
- Certified Fiduciary and Investment Risk Specialist® (CFIRS), Cannon Financial Institute
- Certified Anti-Money Laundering Specialist (CAMS), Association of Certified Anti-Money Laundering Specialists
- Certified Trust Operations Professional (CTOP), Cannon Financial Institute

