



Sara Haley, 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 to ensure seamless integration between MainStreet Advisors' clients and their Trust Accounting platforms not only with the onboarding of new clients, but also to enhance current relationships with more automation in the trading process. She is also available as a resource for evaluating trust accounting procedures, optimizing operational functionality, and consulting on compliance issues. With more than 30 years of experience in Trust Operations, Sara brings both industry experience and a wealth of knowledge 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.

EDUCATION

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

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