

# Sara Neubert



A career minded, proficient, competent, and motivated Executive Office Senior Escalations Representative, with over 21 years of experience in Finance, Account Management, Administration, Customer Service and Escalation Resolution. 14 years in Management, Business Operations, Implementation, Quality Assurance, Banking Regulations, Accounting, Loss Prevention, and Business Acumen. A combination of 3+ years of experience in Human Resources, Independent Testing, Regression Testing and Usability Testing. Approachable, well presented, and proficient in establishing good professional relationships. Able to work independently and effectively in an office or virtual team environment.

## Software

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**Microsoft:** Word, Excel, Outlook, Access, OneNote, PowerPoint, Teams. **SOR:** FDR, Hogan, CSS, JIRA, CIV, Fiserv, Workday, SVP, Shaw, AFS, Supreme. **Windows:** 7, 8, 10, 11. **Case Management:** First Track, EITS, ECar, RecoverEase, CDRS, C.A.R.S. **Secured Data:** Experian, Equifax, TransUnion, CBC Innovis, FastData/LexisNexis. **Imaging:** MARS, OIB, ICMP, Virtual Library, IRRIS/ Multran, DIPR, XPM, Provenir, Provenir Archive. **Telephony:** Cisco Jabber, Softphone, NICE, Nexidia.

## **Wells Fargo Executive Office** (Credit Card)– Sioux Falls, SD – **Senior Escalations Representative** March 2020 to **Present**

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- Present concise and well-articulated findings and recommendations, including rationale, to facilitate resolution of identified matters.
- Participate in research, assessment, and documentation of matters relating to the business' policy and regulatory adherence, risk mitigation, or control efforts.
- Review and apply broadly defined policies, practices, and regulations to evaluate overarching risks, to resolve complaints including legal and regulatory complaints.
- Engage with leadership and subject matter experts for all appropriate LOB (line of business).
- Collaborate and consult with colleagues, internal partners, and other business stakeholders.
- Ability to exercise independent judgment and creative problem-solving techniques.
- Conduct assessments and analysis of basic business or operational outcomes, systems of record, technical assignments, documentation, procedures, or challenges that require research, evaluation, and selection of alternatives.
- Utilize independent judgment to guide moderate risk deliverables.
- Participate in a variety of assigned business operations to ensure success in meeting goals and objectives.
- Knowledge and experience executing the Complaints Management Policy requirements, and the Complaints Management Program Required Corporate Reporting Data Elements (Taxonomy).
- Risk management, quality assurance, business operations, compliance, controls and process experience.

## **Wells Fargo Executive Office** (Credit Card)- Hillsboro, OR – **Research & Remediation Analyst 2** December 2018 to March 2020

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- Strong analytical and critical thinking skills to determine root cause and make recommendations to prevent further issues. Identify and report trends for efficiency gains.
- Experience consulting with Lincoln Financial, Accommodations Management, and Leave Operations.
- Participate in cross-organizational or internal operational initiatives and improvement efforts.
- Risk management, business controls, quality assurance, business operations, compliance, or process experience.
- Coaching, consulting, and mentoring on procedural changes and performance.

## **Wells Fargo Deceased Management** (Credit Card)- Hillsboro, OR – **Operations Legal Specialist 1** August 2017 to December 2018

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- Account reconciliation, prepare final accounting for the prospective Estate's responsibility.
- Strong analytical skills with high attention to detail and accuracy.
- Knowledge of company policies, procedures, legal and relative federal regulatory requirements

**Wells Fargo Deceased Management** (Credit Card)- Hillsboro, OR – **Account Manager 3**

May 2016 to August 2017

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- Research and resolve legal and regulatory complaints.
- Determine appropriate course of action and conduct investigative steps.
- Consult with attorneys regarding Estates/Trusts, account relationships and credit reporting.

**Wells Fargo Home Mortgage** (Home Lending)- Chantilly, VA - **Customer Service Representative 2**

June 2013 to November 2013 (Displaced)

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**Mission:** Collect, compile, and processing of client documentation for application in home lending.

**Wells Fargo Dealer Services** (Auto)- Edina, MN - **Account Manager 3**

February 2011 to June 2013

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**Mission:** Determine appropriate course of action, conduct investigative steps to identify the issues and negotiate on defaulted accounts accordingly.

**Wells Fargo Financial** (Personal Loans)- Vancouver, WA - **Account Manager 2**

May 2008 to February 2011

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**Mission:** Determine appropriate course of action to negotiate defaulted accounts accordingly.

**Education**

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Centreville High School - Clifton, VA  
Maricopa Community College - Mesa, AZ  
University Of North Carolina – Charlotte, NC

**Wells Fargo Accomplishments and Affiliations**

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- Diversity, Equity & Inclusion
    - Disability Network member, Native Peoples Network member and Veterans' Network member.
  - 2012 Leadership Committee
    - Q12- Gallup Team Member Survey Leader.
  - Well Fargo Volunteers

**Skills**

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Crisis Management	Reporting	Conflict Resolution	Coding
Client Relations	Accommodations	Identify Trends/Risks	Data Analytics
Quality Assurance	Root Cause Analysis	Methodologies	Performance Management
Legal Operations	Record Management	Critical Thinking	Communications
Organizational Skills	Integrity	Windows Proficiency	Independent Testing
Collaboration	Active Listening	Microsoft Proficiency	Leadership