

Benjamin Rubin

FINANCIAL OPERATIONS / ANALYTICS / CLIENT EDUCATION

Greater Philadelphia, PA | Benjamin.Lewis.Rubin@gmail.com

PROFILE

Financial services and operations professional with experience in lending, credit-union service, business teaching, and financial consulting. Combines document review, workflow coordination, analytical thinking, and clear communication.

SELECTED EXPERIENCE

Loan Processor

autoMHatic Financial

Managed approximately 30 loan files per week using Encompass and Quickbase; reviewed supporting documents and cleared underwriting conditions.

Coordinated with underwriting and closing teams and trained a new processor in systems, document review, communication, and workflow responsibilities.

Member Service Advisor

Franklin Mint Federal Credit Union

Processed member transactions through Fiserv DNA; supported account, ACH, and loan-payment workflows. Resolved complex account issues, including failed autopay arrangements, and trained teammates.

Adjunct Professor of Business

Pennsylvania Institute of Technology

Created and taught Introduction to Agribusiness, connecting operations, finance, and economics to applied projects and practical decisions.

Blockchain Finance Consultant

Trinity Digital Asset Group

Built Excel-based performance and reporting analyses; explained digital-asset custody, risk, portfolio strategy, and market structure to clients.

EDUCATION

M.S., Financial Technology & Analytics | Wake Forest University | 2024 | GPA 3.97

B.A., English | Temple University | 2017

TOOLS & SYSTEMS

Encompass, Quickbase, Fiserv DNA, Excel, Microsoft 365, SQL, Tableau