

MARK ABELSON

Dallas-Fort Worth Metroplex | (214) 789-4841 | mabelson.work@gmail.com

Experienced financial leader with a strong background in financial and quantitative analysis, workflow automation, project management, and derivatives. Skilled in leading specialized banking operations teams to accurately and efficiently value complex financial securities. Passionate about automating manual processes, mentoring team members, and providing strategic business consulting to drive efficiency and innovation.

CORE SKILLS

- **Finance & Analytical Expertise:** Financial analysis, quantitative finance, data analysis, data management, financial modeling, derivatives valuations, mathematical modeling, financial reporting
 - **Systems & Technical Expertise:** Advanced Excel and Formulas, VBA (Macros), Microsoft Office Suite, Python, SQL, Salesforce, Tableau, Microsoft Power Apps and Power BI, AI Integration, IHS Markit, Bloomberg Terminal
 - **Project Management & Leadership:** AGILE methodology, strategic problem-solving, collaborative leadership and development, listening and focus, high pressure time management and organization
 - **Workflow & Process Optimization:** Full-stack workflow automation, process efficiency improvement, AI-driven automation, data pipeline optimization, cross-system integration, operational streamlining, scalable process automation solutions, ad-hoc scripting
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PROFESSIONAL EXPERIENCE

OPTUM – Remote

March 2025 – Present

Senior Financial Analyst, FP&A (Contract)

- Maintained healthcare pricing models and processes for the Finance Manager during his absence.
- Developed custom automation tools for manual processes, reducing significant time and effort.

DIAMOND BLADE ANALYTICS – Plano, Texas

March 2021 – Present

Owner, Workflow Automation Specialist

- Design and build automation tools to streamline business workflows and reduce manual effort.
- Provide hands-on mentorship, teaching clients how to leverage automation for efficiency gains.
- Create automation tools for market analysis, financial modeling, and data-driven decision-making.
- Manage website development, marketing, social media, and branding to expand business reach.
- Conduct quality assurance testing to ensure reliability and accuracy of automation solutions.
- Write technical content and delivered presentations to simplify automation concepts for users.
- Provide strategic consulting to identify inefficiencies and implement automated solutions.

TOYOTA FINANCIAL SERVICES – Plano, Texas

May 2024 – January 2025

Financial Analyst, Treasuries (Contract)

- Ensured daily cash settlements related to debt, derivatives, and investments were processed.
- Investigated and resolved all issues relating to settlement discrepancies or inaccuracies.
- Coordinated with cash management, derivatives pricing, and trading teams on a daily basis.
- Developed custom advanced Excel tools to automate manual processes to increase efficiency.
- Maintained and optimized all VBA, SQL, Excel templates, and other systems for the entire team.
- Built derivatives models in Wallstreet Suite, IHS Markit, and Bloomberg Terminal for trade booking.

- Managed Long-Term Debt desk, handling communications, invoices, and other daily processes.
- Ran monthly service for Asset Backed Securities and handled all critical month-end tasks.

STATE STREET BANK – Remote

April 2022 – April 2023

Manager, Financial Derivatives Valuations (Contract)

- Managed team of 11 senior associates and associates focused on pricing financial derivatives.
- Led a team overhaul to enhance pricing accuracy, financial knowledge, and technical proficiency.
- Developed structured learning sessions on derivatives products, pricing models, and related topics.
- Reviewed and validated all trade bookings and daily operations to ensure accuracy and compliance.
- Developed an automated macro-based pricing tool that streamlined four manual processes into one.
- Designed a Total Return Swap pricing tool that reduced manual processing time by 30 minutes.
- Created an employee oversight tool to track deadlines and team operational efficiency in real time.
- Automated a CFD pricing process by integrating data importing, validation checks, and reporting.
- Repaired and optimized malfunctioning macros to reduce errors and streamline workflows.
- Developed a reconciliation tool for managerial oversight, resolving all valuation discrepancies.
- Executed derivatives trade bookings, verified trade details, and ensured precision in pricing.
- Utilized Bloomberg Terminal to model derivatives and research market conditions for valuations.
- Managed critical end-of-day pricing processes, ensuring timely validation and sign-off of prices.

JPMORGAN CHASE & CO. – Plano, Texas

June 2021 – November 2021

Fund Servicing Analyst, Financial Derivatives Valuations

- Utilized Bloomberg extensively to model a range of derivatives, ensuring accurate valuations.
- Developed a Total Return Swap pricing analysis tool that reduced pricing discrepancies by up to 90%.
- Served as a liaison between vendors and counterparties, resolving trade and price mismatches.
- Mentored junior analysts in coding automation, derivatives pricing, and financial market concepts.
- Validated complex derivative valuations against market data, identifying and resolving any issues.
- Implemented process enhancements that streamlined trade booking and pricing validations.
- Automated a derivatives pricing validation workflow, reducing manual reconciliation time by 40%.
- Designed an Excel-based tracking tool to monitor daily trade settlements and reduce risks.
- Worked closely with cross-functional teams to ensure compliance with valuation control policies.

THE BANK OF NEW YORK MELLON – Manhattan, New York

January 2019 – December 2020

Analyst of Data Management and Quantitative Analysis, Financial Derivatives Valuations

- Managed the lifecycle of over \$30 trillion in derivatives, ensuring accurate trade capture and pricing.
- Priced Interest Rate Swaps, Credit Default Swaps, Options, Total Return Swaps, and other products.
- Developed automation tools using Python, VBA, and SQL to streamline data processing.
- Created a Bloomberg BVAL pricing tool to validate vendor MTM valuations against live market data.
- Executed critical EOD processes, ensuring accurate derivatives valuations met NASDAQ deadlines.
- Designed a reconciliation tool that flagged discrepancies between BNY and counterparty prices.
- Automated derivatives trade error tracking by extracting data from emails into consolidated reports.
- Developed an Excel-based pricing model integrated with Bloomberg BVAL to improve TRS valuations.
- Partnered with IT to enhance bank systems, ensuring seamless integration with other processes.
- Used Python to automate repetitive tasks within BNY's online in-house derivatives pricing platform.
- Conducted UAT testing for system updates, analyzing discrepancies and providing feedback to IT.
- Built macros for trade economics management, reducing booking time and improving accuracy.
- Executed a comprehensive holdings process to ensure the firm's accounting records were updated.
- Mentored new hires in derivatives pricing, derivatives economics, and coding to enhance efficiency.

- Performed deep-dive research into derivatives structures and market trends using Bloomberg.

ONE CALL CARE MANAGEMENT – Parsippany, New Jersey

January 2018 – December 2018

Billing Analyst, Accounts Receivables (Contract)

- Reviewed patient medical records and converted them into billing codes for insurance.
- Used Excel spreadsheets to calculate contracted rates and verify accurate payments.
- Researched ICD and CPT codes to resolve discrepancies in medical billing processes.
- Identified and corrected billing errors to ensure accurate invoicing and compliance.
- Processed insurance claims and reconciled payment records to avoid discrepancies.

EDUCATION

Rutgers University – Bachelor of Economics