

- Are you a highly driven individual who relishes a challenge?
- Are you looking for a rewarding role with a great company?
- If so, this could be the opportunity for you!

Whether you need a complete wealth review or a quick profile on a prospect, WealthEngine.com delivers. By combining the best and most comprehensive wealth, business and philanthropic data available, we listen to you to customize a research solution that fits your needs and budget. Our wealth screening software and web-based research center support nonprofit organizations and financial services institutions of all sizes and backgrounds.

CLIENT SERVICE ASSOCIATE

WealthEngine is seeking a highly motivated individual to join our team as a Client Service Associate in our Bethesda, Maryland office. This is an entry- to mid-level position that reports directly to the Director, Client Service.

Responsibilities

- Serve as a front-line contact for client inquiries via phone and email regarding product questions or issues.
- Assist with client file delivery and implementation.
- Work with clients to integrate their WealthEngine data into their donor management systems.
- Contribute to special projects, including but not limited to client surveys, annual report collection, and the online Knowledge base.
- Identify trends in customer needs and requests, and effectively communicate those to the Product Development team to improve our product offerings.
- Periodic check-in with clients to ensure superior Client Service is and has been provided.
- Provide custom, private trainings to clients. This responsibility may require occasional travel.

Required Qualifications

- Bachelor's degree.
- Working knowledge of Microsoft Office applications, including Microsoft Access, and a solid understanding of how Internet-based applications work. Must also be comfortable learning new software programs and using online information systems.
- Possesses advanced knowledge of prospect research and the fundraising strategies (at least 2 years experience) used in a development environment to execute on an organization's top prospects.
- Demonstrated understanding of how to identify a top prospect and validate the information on an individual's profile.
- Solid understanding of fundraising concepts, including planned giving (bequests, annuities, trusts), annual fund, and major gifts also required.
- Proven strong organizational and time management skills; attention to detail; excellent oral and written communication skills; and ability to communicate with individuals from diverse backgrounds and cultures.

Benefits

In exchange for your hard work and dedication, we offer:

- PPO medical, dental, and vision insurance
- Participation in 401(k) retirement plan
- Four weeks annual PTO
- Salary commensurate with experience.

To find out more about our company, please visit: <http://www.wealthengine.com>

To apply please send your resume and cover letter to: HR@wealthengine.com