Job opening for a Client Service Associate position at WealthEngine

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** 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 or client 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.
- Manage a client portfolio to include periodic check-in with clients to ensure superior Client Service is and has been provided and that products purchased have been utilized.
- Provide custom, private trainings to clients. This responsibility may require occasional travel.

Qualifications Summary:
Qualified persons will thrive both in an independent and team environment. You must be able to take ownership of workload and projects and complete those projects accurately

and efficiently. You must also be able to work with various internal groups and teams and have the ability to manage multiple, simultaneous projects and deadlines.

The requirements listed below are representative of the knowledge, skill, and/or ability required for this position.

Required Qualifications:

- Bachelor's degree.
- Minimum two years professional experience in account management and/or customer service. Experience in a call-center or help desk environment or software support highly desirable.
- Strong computer application skills including:
  - Working knowledge of Microsoft Office applications, including Microsoft Access
  - Solid understanding of how Internet-based applications work
  - Experience with SalesForce CRM a plus
  - Must also be comfortable learning new software programs and using online information systems.
- 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.

Preferred Qualifications:

- 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.

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