

- 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.*

## PRODUCT TRAINER

WealthEngine is seeking a highly motivated individual to join our Client Service team as a Product Trainer in our Bethesda, Maryland office. This is a senior-level position that reports directly to the Director of Training Services.

### Responsibilities

- Provide training and workshops to groups of clients, both via webinar and in-person. Provide training for remote consultants/partners and sales staff.
- Assist Product Manager with new product rollout initiatives and staff education.
- Manage all aspects of client service and training document development and production including creating, and editing project documents and presentations enforcing WealthEngine's standards throughout all communication materials.
- Build templates, training materials, and other job aids, and managing them on WealthEngine's internal Knowledgebase system.
- Contribute to special projects, including client surveys, writing industry-topic articles for periodicals and attending/presenting at industry conferences.
- Respond to client inquiries via phone and email regarding product questions or issues.

### Required Qualifications

- The ideal candidate will possess a Bachelor's degree with a working knowledge of Microsoft Office applications, including Microsoft Access, and a solid understanding of how internet-based applications work.
- Excellent written and verbal communication skills and able to work independently and as part of a team to achieve desired outcomes. Effective problem-solving skills, proofreading skills, and attention to detail.
- Previous experience in training clients/constituents and staff preferred. Knowledge of instructional methods, ability to communicate with and relate well with others and possession of public contact (speaking) skills.
- Capability to guide "clients" in the learning process and to present subject matter effectively on a group or individual basis. Familiarity with virtual and traditional management skills and the ability to make judgments using knowledge and experience.
- Must possess advanced knowledge of prospect research and the fundraising strategies used in a development environment. Solid understanding of fundraising concepts, including planned giving (bequests, annuities, and trusts), annual fund, and major gifts also required.
- Up to 20% travel 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](mailto:HR@wealthengine.com)