



Job Ref. No: JAML002 (Re-Advertised)

Position: Dedicated Financial Advisor

Jubilee Insurance was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Insurance has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, General and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 450,000 clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi, and Mauritius. It is the only ISO certified insurance group listed on the three East Africa stock exchanges – The Nairobi Securities Exchange (NSE), Dar es Salaam Stock Exchange and Uganda Securities Exchange. Its regional offices are highly rated on leadership, quality and risk management and have been awarded an AA- in Kenya and Uganda, and an A+ in Tanzania. For more information, visit www.JubileeInsurance.com.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Holdings Limited, that focuses on providing fund management and investment advisory products and services to institutional and retail clients. It is licensed and regulated by the Capital Markets Authority (CMA).

We currently have an exciting career opportunity for **Dedicated Financial Advisor** within **Jubilee Asset Management Limited (JAML)**. The position holder will report to the **Manager, Retail Distribution** and will be based at our Head Office in Nairobi.

Role Purpose

To provide Professional Investment Advisory services to our clients within the retail segment. The successful candidate will be responsible for sourcing, retaining, and growing a client base by implementing financial planning solutions in line with the client's needs. The role holder will be required to be up to date with macro-economic trends, market developments as well as monitoring corporate actions of listed companies.

Main duties and responsibilities:

1. Meeting clients to understand their financial objectives by selling & cross selling of all JFSL products and services.
2. Managing, maintaining and building new and existing client relationships.
3. Preparing and presenting proposals to existing and potential clients
4. Provide direct sales support (quality lead generation and effective follow-up) to generate and convert quality leads into sales.
5. Participate in specific product campaigns by ensuring that the products are explained to customers.
6. Adhering to compliance, operational procedures, and practice management standards.
7. Staying abreast of product information, performance, and industry changes.
8. Building a sustainable book of clients in the retail segment.
9. Assists clients grow their investment portfolios by giving them the right advice on where to invest the money for maximum returns while reducing risk.
10. Asks clients pertinent questions to understand their financial goals to advise them correctly on what investment options to take.
11. Advises clients on changing economic and investment trends to assist them in making informed choices about investments in their chosen areas.
12. Interprets financial and investment reports on behalf of clients to assist them in having a deeper understanding of the performance of their investments.
13. Carries periodic updates of clients' investment portfolios to assist clients in seeing the performance of their portfolios.
14. Builds client relationships that assist them in offering new investment products and services.
15. Meets with clients to understand their financial needs and objectives, risk tolerance, income, and asset profiles to assist them in choosing the ideal investment options.
16. Complies with all regulatory requirements in offering advice to clients to avoid penalties from regulators.
17. Consistently achieving the allocated sales targets.

Key Competencies

1. Prospecting skills
2. Personal Branding
3. Social Selling skills
4. Virtual Selling Skills
5. Consultative Selling skills
6. Able to work independently
7. Relationship management and networking skills
8. Able to plan and manage time effectively
9. Strong negotiation skills are required.
10. Ability to understand economic and financial trends is a requirement.
11. Good communication skills.
12. Good stakeholder management skills.
13. A high level of attention to detail
14. Ability to work under pressure.

Qualifications

1. Bachelor's degree/Diploma in relevant field
2. Investment industry knowledge (added advantage)

Relevant Experience

Minimum of 1 years' work experience in the Financial Services industry in a Sales role within the Asset/wealth and Investment management space

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by Thursday, 15th June 2023.

Only shortlisted candidates will be contacted.