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**Job Ref. No:** JAML008

**Position:** Dedicated Financial Advisors

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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](http://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 Advisors** within **Jubilee Asset Management Limited (JAML)**. The position holder will report to the **Manager Retail Distribution and** will be based at our Financial Advisory Centers in Nairobi.

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### **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 JAML Investment 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. Assists clients grow their investment portfolios by giving them the right advice on where to invest the money for maximum returns while reducing risk.
8. Asks clients pertinent questions to understand their financial goals to advise them correctly on what investment options to take.
9. Complies with all regulatory requirements in offering advice to clients to avoid penalties from regulators.
10. Consistently achieving the allocated sales targets.

### **Key Competencies**

11. Prospecting skills
12. Personal Branding & Good communication skills
13. Social Selling & Negotiation skills
14. Virtual Selling Skills
15. Relationship management and networking skills
16. Able to plan and manage time effectively
17. Strong negotiation skills are required.
18. Ability to understand economic and financial trends is a requirement.

### **Qualifications**

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

### **Relevant Experience**

Minimum of 1 year work experience in the Financial Services industry in a Sales role in a Bank or in the Asset/wealth Management and Investment space.

**If you are qualified and seeking an exciting new challenge, please apply via [jamlretailsales@jubileekenya.com](mailto:jamlretailsales@jubileekenya.com) before 25<sup>th</sup> April 2024 clearly quoting the Job Reference Number & Job title**

**Only shortlisted candidates will be contacted.**