



Position: Financial Advisor – Unit linked Products

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 1.9 million 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.

We currently have an exciting career opportunity for **Financial Advisor – Unit Linked Products, Jubilee Life Insurance Limited**. The position holder will report to the **Team Lead – Unit Linked Products** and will be based at the Head Office in Nairobi.

Role Purpose

The job holder will be responsible of providing professional financial advice to Unit linked investment product Holders, meeting set revenue budgets, and effectively building and growing a portfolio of clients for Unit linked investment solution. Additionally, the role holder will be responsible for growth of unit linked products portfolio, ensuring seamless customer experiences, and collaborating with stakeholders to achieve strategic objectives.

Main Responsibilities

1. Prospecting and meeting new clients with the main purpose of pitching and selling Unit Linked products.
2. Identify opportune markets for Unit linked sells and lead generation.
3. Prepare monthly pipeline that will lead to closure and meeting monthly KPI set revenue budget
4. Drive portfolio growth through Unit linked sells.
5. Preparing and presenting proposals to new and existing clients
6. Effective follow up on lead closure of business and end to end process flow for new business set up.
7. Participate in Product campaigns and presentations and tackling market related client queries.
8. Adhering to compliance, operational procedures, and practice management standards
9. Consistently achieving set budgets for Unit linked products.

Corporate Governance

1. Adhere to regulatory requirements and internal policies, ensuring compliance in all aspects.
2. Implement and uphold robust data protection and privacy practices, safeguarding customer information and ensuring confidentiality.
3. Participate in audits and internal control assessments, addressing any identified gaps or issues promptly.
4. Compliance: Stay updated with insurance regulations and underwriting best practices to ensure compliance with industry standards
5. Adherence to the laws and regulations of Kenya, the policies and regulations within the insurance industry and all internal company policies and procedures.

Key Competencies

1. Financial Acumen: Sound understanding of financial concepts, investment products, and retirement planning strategies to deliver knowledgeable advice and recommendations.
2. Sales and Business Development: Strong ability to identify opportunities for business growth, promote investment products.
3. Strong understanding of investments and sales cycle
4. Adaptability to technological advancements and industry changes.
5. Strategic thinking and business acumen for identifying growth opportunities.
6. Strong relationship-building and negotiation abilities and stake holder management
7. Analytical mindset for data-driven decision-making
8. Customer-centric approach, focusing on enhancing customer experiences in Unit linked products.

Qualifications

1. Bachelor's degree in insurance, Finance, Business, Marketing, or any other related course
2. Diploma in Insurance
3. CISI qualification and ECOP will be an added advantage.

Relevant Experience

1. Minimum 3 – 5 years' experience in a similar role
2. Proven track record of successfully handling clients and portfolio management.
3. Strong ability to build and maintain strong relationships with clients and with partners.
4. Experience in Team leadership or similar position will be an added advantage.
5. Demonstrated ability to think strategically and develop actionable plans to achieve business objectives.

**If you are qualified and seeking an exciting new challenge,
please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and
Position by 23rd February 2024.
Only shortlisted candidates will be contacted.**