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**Job Ref. No:** JAML005

**Position:** Independent Financial Advisors (IFA)

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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 **Independent Financial Advisors** within **Jubilee Asset Management Limited (JAML)**. The position holder operates Independently but will be supported by the **Manager, Retail Distribution**.

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#### **Role Purpose**

To provide Professional Investment Advisory services to our clients within the Retail, High Net worth & Institutional segments. 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. Complies with all regulatory requirements in offering advice to clients to avoid penalties from regulators.
9. Consistently achieving the allocated sales targets.

#### **Key Competencies**

10. Prospecting skills
11. Personal Branding & Good communication skills
12. Social Selling & Negotiation skills
13. Virtual Selling Skills
14. Able to work independently and deliver results without supervision.
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/Certificate in relevant field.
2. Any Professional Certificate in Insurance or Investments will be an added advantage.
3. Investment industry knowledge Mandatory.

#### **Relevant Experience**

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Minimum of 3 years' sales experience in the Financial Services industry selling investment products or Insurance products.

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

**Only shortlisted candidates will be contacted.**