Jubilee ASSET MANAGEMENT

Job Ref. No. **JAML026**

Position: **Private Wealth Advisors (1 Year Contract)**

Jubilee Asset Management Limited (JAML) is a premier Asset Manager that offers differentiated investment products and solutions across core assets, alternative assets and across all market cycles. Our clients include institutions, high net worth individuals (HNWI) and retail clients. Our differentiated investments products and solutions include Insurance Fund Management, Segregated Portfolio Management, Unit Trusts, Alternative Investments, Offshore Investments and Structured Investment Products. For more information, visit https://jubileeinsurance.com/ke/asset-management/.

We currently have an exciting career opportunity for **Private Wealth Advisors (2)** within **Jubilee Asset Management Limited.** The position holder will report to the **Business Development Manager – HNWI & Institutions** and will be based at the Head Office in Nairobi.

Role Purpose

The role holder is responsible for delivering personalized financial advice and wealth management services to high-net-worth individuals (HNWI). This role involves building and maintaining strong client relationships, developing tailored financial strategies, and collaborating with the business development team to support the growth of the HNWI client base. The Private Wealth Advisor ensures that clients receive exceptional service and guidance to achieve their financial goals.

Main Responsibilities

1. **Client Relationship Management**
    - Develop and maintain strong, long-term relationships with HNWI clients.
    - Understand clients' financial needs, risk tolerance, and goals to provide personalized financial advice and solutions.
    - Conduct regular reviews of client portfolios to ensure alignment with financial objectives and market conditions.
    - Serve as the primary point of contact for clients, ensuring timely and accurate responses to inquiries and requests.
2. **Financial Planning and Advisory**
    - Develop comprehensive financial plans tailored to the unique needs of HNWI clients.
    - Provide expert advice on a range of financial products and services, including equities, fixed income, alternative investments, and insurance solutions.
    - Monitor and evaluate investment performance, recommending adjustments as necessary to optimize client portfolios.

3. **Business Development**
    - Collaborate with the Head of Business Development – HNWI & Institutions to identify and pursue new business opportunities.
    - Participate in networking events, seminars, and other activities to expand the firm's client base and enhance its market presence.
    - Develop and execute client acquisition strategies to attract and retain HNWI clients.
    - Ability to generate 100 Mn in sales per month through your identified pipeline.
4. **Compliance and Risk Management**
    - Ensure all client interactions and transactions comply with relevant regulations, company policies, and ethical standards.
    - Maintain accurate and up-to-date client records, including financial plans, investment proposals, and communications.
    - Identify and manage potential risks associated with client portfolios, providing proactive solutions and recommendations.
5. **Team Collaboration and Professional Development**
    - Work closely with other members of the business development and investment teams to deliver a cohesive and integrated client experience.
    - Stay current with market trends, economic developments, and regulatory changes to provide informed advice to clients.
    - Participate in ongoing training and professional development to enhance knowledge and skills in wealth management and financial advisory services.

Corporate Governance

1. Compliance: Stay updated on industry regulations, compliance requirements, and best practices.
2. Adherence to the laws and regulations of Kenya, the policies and regulations within the Asset Management industry and all internal company policies and procedures.
3. Ensuring compliance with applicable statutory and regulatory requirements and establishing mitigation measures against emerging business risks.
4. Implement effective risk management strategies, including appropriate internal controls, to mitigate operational, financial, and regulatory risks.

Culture

1. Fostering a corporate culture that promotes ethical practices and good corporate citizenship while maintaining a conducive work environment.
2. Collaborate with cross-functional teams to develop initiatives that promote a positive and inclusive company culture.

Key Competencies

1. In-depth knowledge of Asset Management regulations and industry practices.
2. Analytical and problem-solving skills to assess and address risks.
3. Excellent communication and interpersonal skills to educate and advise stakeholders.
4. Ability to collaborate effectively with cross-functional teams.
5. Detail-oriented with strong organizational and time management abilities.
6. Proactive approach to staying updated on regulatory developments.

Qualifications

1. Bachelor's degree in Investments, Business, Finance or any other related course

Relevant Experience

1. Minimum 2-3 years' experience in wealth management or financial advisory.
2. In-depth knowledge of the asset management industry.
3. Proven track record of success in onboarding and managing high-net-worth client relationships.

If you are qualified and seeking an exciting new challenge,
please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and
Position by 15th January 2025.
Only shortlisted candidates will be contacted.