Job Ref. No. **JAML045**

Position: **BRANCH MANAGER**

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 **Branch Manager** within **Jubilee Asset Management Limited.** The position holder will report to the **Business Development Manager – Retail Distribution** and will be based in Mombasa

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Role Purpose

The Branch Manager will be responsible for overseeing retail distribution operations in Mombasa County. The role involves building and maintaining strong client relationships, driving branch sales performance, and ensuring efficient service delivery. The role holder will report to the Business Development Manager – Retail Distribution and will be responsible for executing strategies to expand market reach and enhance customer experience.

Main Responsibilities

Strategic Function

1. **Business Development & Market Expansion**
    - Collaborate with the Business Development Manager – Retail Distribution to identify and pursue new business opportunities.
    - Participate in networking events, seminars, and forums to enhance market presence.
    - Develop and execute client acquisition strategies to expand market share.
    - Achieve monthly sales targets and contribute to revenue growth.
2. **Market Research & Competitive Analysis**
    - Stay updated on market trends to provide informed client recommendations.
    - Conduct competitor analysis to enhance product offerings and client engagement strategies.
3. **Investment Strategy Execution**
    - Work closely with the investment team to ensure appropriate asset allocation strategies for clients.
    - Support the structuring of innovative investment products to meet the diverse needs of clients.

4. **Technology & Digital Engagement**
    - Leverage digital tools and platforms to enhance client engagement and service delivery.
    - Promote digital wealth management solutions to clients to enhance accessibility and efficiency.

Operational Function

1. **Branch Operations Management**
    - Oversee the daily operations of the branch to ensure efficient service delivery.
    - Ensure the branch meets its financial and operational targets, including client acquisition and retention.
    - Implement strategies to optimize workflow and enhance customer experience.
2. **Client Relationship Management**
    - Develop and maintain strong, long-term relationships with retail clients.
    - Conduct regular client portfolio reviews to align with financial goals and market conditions.
    - Serve as the primary point of contact for branch clients, ensuring timely and accurate responses.
3. **Regulatory Compliance & Risk Management**
    - Ensure compliance with relevant industry regulations, ethical standards, and company policies.
    - Maintain accurate and up-to-date client records, investment proposals, and communications.
    - Identify and manage potential risks within client portfolios, providing proactive solutions.

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. Foster a corporate culture that promotes ethical practices and professionalism.
2. Collaborate with internal teams to develop initiatives that enhance a positive and inclusive work environment.
3. Encourage continuous learning and development within the organization.

Key Competencies

- Strong knowledge of retail distribution, wealth management principles, and investment strategies.
- Excellent analytical and problem-solving skills to assess financial risks and opportunities.
- Exceptional communication and interpersonal skills for effective client relationship management.
- Ability to work collaboratively within cross-functional teams.
- Detail-oriented with strong organizational and time management abilities.
- Proactive approach to staying updated on regulatory and market developments.

Qualifications

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

Relevant Experience

1. Minimum 3-5 years' experience in wealth management or financial advisory.
2. In-depth knowledge of the asset management industry.

If you are qualified and seeking an exciting new challenge,
please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by 17th February 2025.
Only shortlisted candidates will be contacted.