

**Job Ref. No. JAML056**

**Position: Client Services Officer - Onboarding**

---

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, Asset Management 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](http://www.JubileeInsurance.com).

We currently have an exciting career opportunity for the role **Client Services Officer (Onboarding)** within **Jubilee Asset Management Limited**. The position holder will report directly to the **Assistant Manager-Fund Administration**. The role will be based at our Head Office in Nairobi.

---

**Role Purpose**

The Client Services Officer – Onboarding will be responsible for managing the end-to-end onboarding process for new clients, ensuring compliance with regulatory requirements, and delivering a seamless client experience. The role will focus on Know Your Customer (KYC) checks, account setup, and effective communication with both internal teams and clients. The officer will play a critical role in building strong client relationships, supporting operational efficiency, and upholding Jubilee Asset Management Limited's service standards.

**Main Responsibilities**

**Operational**

1. Manage the complete onboarding process for new clients, including account opening, KYC verification, and documentation.
2. Ensure accurate and timely data entry into client management systems.
3. Liaise with compliance, operations, and relationship management teams to ensure smooth onboarding.
4. Monitor client account setup progress and resolve any delays or issues.
5. Maintain up-to-date records of onboarding activities in line with internal policies and regulatory requirements.

**Strategy**

1. Support initiatives to streamline and enhance the client onboarding process.
2. Provide feedback on client needs and service gaps to improve operational efficiency.
3. Contribute to the implementation of digital onboarding solutions.

**Corporate Governance**

1. Ensure adherence to regulatory guidelines, AML/KYC requirements, and company policies.

2. Support internal and external audits by providing accurate onboarding records.
3. Identify and escalate potential risks in onboarding processes.

### **People and Culture**

1. Collaborate with colleagues across teams to deliver excellent client service.
2. Uphold Jubilee's values by fostering a client-centric culture.
3. Support knowledge-sharing and contribute to continuous improvement in onboarding practices.

### **Key Competencies**

1. Client-focused mindset with strong service orientation.
2. High level of integrity and confidentiality.
3. Teamwork and collaboration.
4. Adaptability and flexibility in handling multiple tasks.
5. Strong work ethic and accountability.

### **Qualifications**

1. Bachelor's degree in Business Administration, Finance, Economics, or a related field.

### **Relevant Experience**

1. Experience in client services, operations, or onboarding within the financial services or asset management sector.
2. Experience with AML/KYC compliance and client onboarding systems is preferred.

**If you are qualified and seeking an exciting new challenge,  
please apply via [recruitment@jubileekenya.com](mailto:recruitment@jubileekenya.com) quoting the Job Reference Number and Position  
by 29<sup>th</sup> August 2025.  
Only shortlisted candidates will be contacted.**