Job Ref. No: JLIL 351

Position: Senior Relationship Officer

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 a **Senior Relationship Officer** within **Jubilee Life Insurance Limited.** The position holder will report to the **Senior Manager- Investments & Client Relations** and will be based at our Head Office in Nairobi.

Role Purpose

The role holder will be responsible for strengthening and managing client relationships, ensuring timely, accurate, and high-quality service delivery to pension scheme clients while providing regular investment updates and insights. The position involves coordinating client engagement activities, supporting scheme operations, and maintaining compliance with regulatory standards. The Senior Relationship Officer plays a key role in fostering client confidence, retention, and growth by aligning service delivery with Jubilee Life's commitment to excellence and integrity.

Main Responsibilities

1. **Strategy**

- Execute the strategic client service and retention plan for the Corporate Life & Pensions Division under the guidance of the Team Leader.
- Support the implementation of business growth initiatives by identifying cross-selling and upselling opportunities across pension and investment products.
- Conduct market intelligence on pension and investment trends to inform client engagement and investment communication strategies.
- Support management in analyzing client portfolios to enhance service efficiency and strengthen business relationships.

2. **Relationship Management**

- Serve as the primary point of contact for assigned pension scheme clients, trustees, and members, ensuring consistent, timely, and professional communication.
- Coordinate onboarding for new schemes and ensure compliance with documentation and RBA requirements.
- Facilitate member education sessions, trustee meetings, and client briefings to promote awareness and confidence in Jubilee Life's products and services
- Maintain proactive client communication through periodic updates, newsletters, and feedback sessions.
- Develop and nurture long-term relationships with corporate clients, enhancing retention and satisfaction levels.

3. **Operational Excellence**

- Collaborate with internal departments (Pension Operations, Finance, Legal, IT) to ensure efficient service delivery, query resolution, and timely response to client requests.

- Monitor contribution collections, benefit processing, and reconciliations in coordination with relevant teams to meet agreed turnaround times.
- Support the preparation and review of scheme reports, benefit statements, and other client deliverables.
- Maintain accurate and up-to-date client records, service logs, and meeting documentation in line with operational policies.
- Coordinate with external administrators and auditors to ensure timely submission of reports and compliance documents.

4. Investment Oversight & Reporting

- Liaise with the Investment Team to provide clients with accurate and timely investment updates, performance summaries, and market outlooks.
- Monitor economic and market developments to provide informed feedback to clients and management on potential portfolio impacts.
- Participate in client investment review meetings, offering insights on performance trends and recommendations.
- Support the preparation and distribution of quarterly investment reports and trustee briefings.
- Assist in aligning client investment strategies with regulatory requirements and organizational objectives.

5. Jubilee Life Brand

- Promote effective public relations and enhance the company's corporate image in all client interactions.
- Ensure clients experience a consistent, professional and high-quality service aligned with Jubilee Life's brand values.

6. Corporate Governance

- Ensure adherence to internal policies, standard operating procedures, and RBA regulations in all client and investment activities.
- Support the preparation and submission of statutory returns, audited financial statements, and trustee reports within defined timelines.
- Participate in audits and promptly address compliance gaps or action points.
- Uphold data privacy and confidentiality in all client-related communications and documentation.
- Identify and report any emerging risks related to client service or investment performance.

7. People & Culture

- Cross-Functional Collaboration: Actively participate in cross-functional project teams to drive collaboration, innovation, and accountability across departments and the Group.
- Employee Collaboration Index: Participate in a minimum of 2 company projects per year with an 80% success rate and engage in at least 1 Group-wide project per year.
- Skills and Competency Development Index: 100% compliance with your training plan annually to support personal and professional growth, ensuring alignment with career paths and future challenges.
- Cultural Alignment Index (CAI): Attain the Company's CAI target score by embedding Jubilee's values (e.g., innovation, teamwork, excellence) into project execution and team dynamics.
- Conflict Resolution: Address interpersonal or project-related conflicts constructively, maintaining team morale and focus on shared goals.
- Resource Advocacy: Communicate needs (e.g., tools, training, support) to supervisors to ensure personal and team success.

Key Competencies

- Relationship Management & Stakeholder Engagement
- Investment Awareness & Analytical Thinking
- Customer Service Orientation
- Report Writing & Presentation Skills
- Knowledge of Pension Regulations and RBA Guidelines
- Attention to Detail & Data Accuracy
- Teamwork and Collaboration
- Ethical Integrity and Professionalism

Academic Background & Relevant Qualifications

- Bachelor's degree in Business Administration, Finance, Economics, or Actuarial Science from a recognized institution.
- Professional certifications in pensions, financial planning, or customer relationship management (e.g., CRM, TDPK, CII, CIFA, CISI, or RBA-accredited programs) are highly desirable.
- A Master's degree will be an added advantage.
- Minimum of 4–6 years of experience in client relationship management, preferably within life insurance, pension administration, or fund management.
- Demonstrated experience in managing institutional clients, pension schemes, or investment accounts.
- Proven track record in client reporting, investment communication, and regulatory compliance.
- Strong analytical and problem-solving abilities with attention to accuracy and detail.

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 November 2025.
Only shortlisted candidates will be contacted.