Job Ref. No: JLIL 352

Position: 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 **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

To manage and enhance relationships with pension scheme clients, including trustees and scheme members, by ensuring timely, accurate, and professional service delivery. The role acts as a key point of contact for client queries, onboarding, and ongoing communication, while supporting compliance with regulatory requirements and promoting Jubilee Life's brand. The relationship officer also identifies opportunities for business growth, supports client retention, and contributes to the efficient administration of retirement benefits schemes.

Main Responsibilities

1. Strategy

- Execute the strategic plan for the Pensions department under guidance from the Team Leader.
- Identify opportunities for business growth, client acquisition, and cross-selling of retirement benefits products (e.g., Annuities, Provident Funds, IDD).
- Conduct market research and competitor analysis to inform client engagement and operational strategies.
- Use data-driven insights to optimize operational performance and support strategic decision-making.

2. Client Engagement & Relationship Management

- Serve as the day-to-day contact for pension scheme clients, addressing queries and service requests promptly.
- Facilitate onboarding of new clients and staff, ensuring all documentation, compliance, and regulatory requirements are met.
- Conduct member education sessions, client visits, and trustee briefings to enhance engagement and satisfaction.
- Provide personalized support for high-net-worth clients, including tailored pension solutions.
- Identify and implement client retention, upselling, and cross-selling strategies.
- Monitor competitor activity and industry trends to advise on client servicing improvements.

3. Operational & Service Delivery Coordination

- Ensure timely collection, reconciliation, and reporting of contributions in collaboration with Pension Operations and Allocations teams.
- Liaise with Claims and Finance teams to process withdrawals, transfers, and other client requests within agreed timelines.
- Support external administrators by coordinating service delivery, reports, and meeting schedules.

- Maintain accurate client records, service logs, and correspondence to ensure traceability and compliance.
- Assist in audits and regulatory inspections, providing required documentation and resolving identified gaps.

4. Reporting & Feedback

- Prepare client service performance reports and summaries for internal and external stakeholders
- Capture client feedback and contribute recommendations to improve service delivery and client satisfaction.
- Document minutes of meetings and action items, ensuring timely follow-through.

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 all pension schemes adhere to operational, regulatory, and quality standards (RBA, KRA, other relevant bodies)
- Coordinate with fund accountants and administrators to prepare and file audited financial statements on time.
- Uphold data protection, confidentiality, and Jubilee Life governance standards in all client interactions.
- Stay updated on pension legislation, RBA guidelines, and industry best practices, implementing adjustments as required.

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
- Customer Service Orientation
- Attention to Detail & Data Accuracy
- Analytical & Problem-Solving Skills
- Knowledge of Pension Schemes, Retirement Benefits, and Compliance Requirements
- Communication: Report-writing, presentation, and client engagement
- Collaboration & Teamwork
- Ethical Integrity and Professionalism

Academic Background & Relevant Qualifications

- Bachelor's degree in Finance, Business Administration, Actuarial Science, or a related field
- Professional certifications in pensions, insurance, financial planning, or CRM (e.g., TDPK, CII, RBA-accredited courses) are highly desirable.
- Master's degree is an added advantage.
- Minimum 3–6 years' experience in client relationship management, pensions, or retirement benefits administration.
- Proven ability to manage client relationships, resolve issues, and deliver exceptional service.
- Strong working knowledge of pension operations, retirement planning, and regulatory frameworks.
- Detail-oriented with excellent organizational, negotiation, and presentation skills.
- Analytical mindset with strong problem-solving capabilities.
- Ability to work collaboratively across multiple teams and manage various stakeholders effectively.

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.