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**Job Ref. No: JAML065**

**Position: Branch Manager - Meru**

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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 450,000 clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi. 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 a **Branch Manager– Retail Distribution (Meru)** within **Jubilee Asset Management Limited**. The position holder will report to the **Business Development Manager– Retail Distribution** and will be based at our Meru Branch.

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### **Role Purpose**

The Branch Manager – Retail Distribution (Meru) will be responsible for driving the growth, profitability, and operational excellence of the branch. The role holder will oversee all branch activities, including retail distribution, client relationship management, team leadership, and service quality assurance.

This position plays a pivotal role in executing Jubilee Asset Management’s retail strategy by expanding market reach, increasing assets under management (AUM), and fostering a culture of exceptional client experience. The Branch Manager will lead a high-performing team of Team Leaders and Dedicated Financial Advisors (DFAs), ensuring achievement of branch sales targets and alignment with the company’s vision of becoming the region’s most trusted and innovative investment partner.

### **Key Responsibilities**

#### **Strategic Planning and Execution**

1. Develop and implement strategic business and sales plans for the Nairobi Central Branch in alignment with Jubilee Asset Management’s overall growth objectives.
2. Identify and capitalize on market opportunities to grow the retail client base and enhance AUM.
3. Develop and manage the branch’s annual budget, forecasts, and performance targets, ensuring continuous achievement of financial and operational KPIs.
4. Contribute to the formulation of retail distribution strategies through data-driven insights and branch performance analytics.

## **Business Growth and Client Relationship Management**

1. Drive acquisition of new retail clients while strengthening and deepening relationships with existing clients.
2. Ensure delivery of personalized, value-driven financial and investment solutions tailored to client needs.
3. Lead and coordinate partnership-driven events, activations, and client engagement initiatives aimed at enhancing brand visibility and promoting product uptake.
4. Collaborate with marketing and business development teams to design and implement branch-specific promotional campaigns and investor education programs.
5. Monitor client satisfaction levels and proactively address feedback to maintain strong retention and loyalty.

## **Operational Excellence and Service Delivery**

1. Oversee day-to-day branch operations, ensuring efficiency, compliance, and adherence to service excellence standards.
2. Ensure timely and accurate preparation of reports, including sales, revenue, and operational performance metrics.
3. Supervise the implementation of effective service protocols to guarantee a seamless client experience at every touchpoint.
4. Maintain optimal utilization of branch resources, infrastructure, and systems to support business continuity and operational integrity.
5. Coordinate with internal departments (Investment, Risk, Compliance, and Finance) to deliver integrated and compliant investment solutions.

## **People Leadership and Culture**

1. Lead, coach, and mentor Team Leaders and Dedicated Financial Advisors to achieve individual and branch sales targets.
2. Oversee recruitment, onboarding, and performance management of branch staff in collaboration with HR and Training functions.
3. Maintain an optimal team structure — ensuring a balanced distribution of financial advisors across teams, with a target of 15 advisors per team across 10 teams — to maximize coverage and productivity.
4. Partner with the Training and Recruitment Manager to enhance the skills, professionalism, and productivity of all financial advisors.
5. Foster a high-performance culture centered on collaboration, integrity, and customer-centricity.
6. Conduct regular performance evaluations and implement development plans to build a capable and motivated branch team.

## **Risk Management, Compliance, and Corporate Governance**

1. Ensure strict adherence to all regulatory, legal, and company policies governing investment and distribution activities.
2. Implement robust internal control systems to safeguard client and company assets.
3. Maintain accurate documentation and compliance with the Capital Markets Authority (CMA) and other relevant regulators.
4. Promote a culture of ethical conduct, transparency, and accountability in all branch operations.
5. Identify and mitigate operational, reputational, and financial risks through continuous monitoring and proactive interventions.

## **Market Intelligence and Business Insights**

1. Track competitor activities, market dynamics, and emerging investment trends to inform business decisions.
2. Provide timely insights and recommendations to management for improving products, pricing, and service delivery.
3. Analyze customer needs and feedback to support product innovation and the refinement of retail investment offerings.

## **Leadership and Stakeholder Engagement**

1. Provide visionary leadership to the branch team, ensuring alignment with JAML's strategic objectives and organizational culture.
2. Represent the branch in corporate forums, client meetings, and stakeholder engagements.
3. Champion JAML's brand positioning and commitment to excellence in investment management across all interactions.
4. Drive collaboration and synergy across departments to deliver integrated and superior client experiences.

## **Key Skills and Competencies**

1. Strategic Thinking: Ability to align branch operations with organizational goals and identify growth opportunities.
2. Leadership: Capacity to inspire, mentor, and manage a high-performing team.
3. Financial Acumen: Proficiency in budgeting, financial analysis, and achieving revenue targets.
4. Regulatory Compliance: Knowledge of laws and regulations like AML, CFT, and Data Protection.
5. Operational Excellence: Skill in optimizing processes to enhance efficiency and service delivery.
6. Customer Relationship Management: Strong relationship-building and client service skills.
7. Corporate Governance: Ability to ensure transparency, accountability, and ethical operations.
8. Communication: Excellent verbal and written communication for engaging stakeholders.
9. Problem-Solving: Analytical thinking to address challenges and implement solutions.
10. Cultural Awareness: Commitment to fostering inclusivity and adapting to dynamic environments.

## **Academic Qualifications**

- Bachelor's Degree in Business Administration, Finance, or a related field. Master's degree is a plus.

## **Relevant Experience**

- At least 5–7 years of experience in financial services, asset management, or investment-related roles. with at least 4 years in a management role.

**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**

**31<sup>st</sup> December 2025**

**Only shortlisted candidates will be contacted.**