



Job Ref. No: JAML 070

Position: IFA Coordinator

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, 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.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Holdings Limited, with a focus on providing fund management and investment advisory products and services to retail and institutional clients. JAML is licensed as a Fund Manager and regulated by the Capital Markets Authority (CMA) and the Retirement Benefits Authority (RBA).

We currently have an exciting career opportunity for **IFA Coordinator** within **Jubilee Asset Management Limited**. The role holder will report to the **Business Development Manager- Retail Distribution** and will be based at our Nairobi Office.

Role Purpose:

The IFA Coordinator is responsible for strengthening the Independent Financial Advisor (IFA) channel by driving strategic initiatives, enhancing operational efficiency, ensuring compliance, and fostering a culture of collaboration and excellence. The role will support IFAs through training, engagement, and performance monitoring to achieve business growth and deliver exceptional client experiences.

Main Responsibilities:

1.Strategic Planning and Execution

- Support the implementation of the IFA business strategy to drive growth and profitability.
- Conduct regular training and product knowledge sessions to align IFAs with company strategy, products, and market positioning.
- Provide data-driven insights and recommendations to support strategic decision-making and business development.
- Partner with IFAs in developing client acquisition plans and sales initiatives that align with JAML's overall objectives.

2. Operational

- Act as the primary liaison between IFAs and internal departments to ensure seamless service delivery.
- Coordinate onboarding, induction, and integration of new IFAs into JAML systems and culture.
- Oversee timely resolution of IFA and client queries to enhance customer experience and satisfaction.
- Prepare and submit periodic performance and progress reports highlighting key activities, metrics, and outcomes.
- Support the achievement of new business targets and maintain Assets Under Management (AUM) levels in line with budget expectations.

3. People Leadership and Culture

- Foster strong relationships and collaboration within the IFA network to promote engagement and performance.
- Promote a learning culture by facilitating continuous product and market training.

- Champion JAML's values and culture in all interactions with IFAs and internal teams.
- Provide mentorship and guidance to newly recruited IFAs to ensure alignment with organizational expectations.

4. Risk Management, Compliance, and Corporate Governance

- Ensure adherence to all internal policies, regulatory requirements, and ethical standards in IFA operations.
- Monitor IFA activities to identify and mitigate compliance risks.
- Maintain accurate records and documentation in line with governance frameworks.
- Promote a culture of accountability, transparency, and compliance within the IFA network.

Key Competencies:

- Excellent communication and interpersonal skills.
- Strong planning, coordination, and analytical capabilities.
- Customer-centric with a focus on results and service quality.
- Sound understanding of financial products and markets.
- Proficiency in MS Office and digital engagement platforms.

Academic Background & Relevant Qualifications:

1. Bachelor's Degree in Business, Marketing, Finance, or a related field.
2. Minimum of 2–3 years of experience in financial services, sales coordination, or relationship management.
3. Prior experience working with IFAs or distribution networks is an added advantage.

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by Tuesday, 23rd December 2025.