Jubilee ASSET MANAGEMENT

Job Ref. No: JAML 069

Position: Relationship Manager – HNWI

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 **Relationship Manager – HNWI** within **Jubilee Asset Management Limited.** The role holder will report to the **General Manager -Business Development** and will be based at our Head Office in Nairobi.

Role Purpose:

The role holder is responsible for driving business growth within the High-Net-Worth Individual (HNWI) segment by identifying new opportunities, strengthening client relationships, and delivering tailored investment solutions. The Job holder will also support client retention across the HNWI segment. This position also contributes to strategic initiatives that enhance JAML's market presence and overall business performance.

Main Responsibilities:

1. Strategy:

- Develop and implement the strategic plan for the company, aligned with the overall corporate strategy.
- Monitor industry developments, regulatory changes, and emerging market conditions to adjust strategies accordingly.

2. Business Development:

- Identify and pursue business development initiatives to expand the company's client base, with a specific focus on high-net-worth segments.
- Identify new business opportunities for high-net-worth clients.
- Develop and maintain relationships with key stakeholders, including corporate clients and high-net-worth individuals.
- Collaborate with the marketing and sales teams to create targeted campaigns and promotional strategies to attract new clients.
- Analyse market trends and competitor activities to identify opportunities for differentiation and competitive advantage.
- Explore partnerships, joint ventures, and strategic alliances to enhance the division's market presence and offerings.
- Conduct market research to understand the evolving needs of corporate and high-net-worth clients, tailoring services and products accordingly.

3. Client Relationship Management:

- Establish strong and enduring relationships with high-net-worth clients and understand their financial goals, risk tolerance, and preferences.
- Regularly communicate with clients to provide updates on portfolio performance, market conditions, and investment strategies.
- Collaborate with the client service team to address client inquiries, concerns, and requests promptly and effectively.
- Organize client events, seminars, and forums to enhance engagement and strengthen relationships.

4. Innovation and Product Development:

- Drive innovation in product development by identifying opportunities to create bespoke investment solutions for high-net-worth clients.
- Collaborate with the product development team to design and introduce new investment products and services.
- Ensure that the division remains at the forefront of industry trends and emerging technologies to provide innovative solutions.

5. Corporate Governance (Regulatory and Compliance):

- Ensure compliance with regulatory requirements, industry standards, and internal policies related to asset management activities.
- Establish and maintain effective internal control systems and risk management frameworks.
- Keep abreast of regulatory changes and communicate their impact on the company.
- Conduct regular audits and reviews to ensure adherence to regulatory and compliance standards.

6. Thought Leadership, Branding & Market Visibility

- Provide strong leadership to the team, setting clear goals, providing feedback, and promoting professional development.
- Encourage a client-centric approach, ensuring high-quality service delivery and maintaining strong relationships with clients.
- Promote ethical conduct, integrity, and accountability throughout the division.

7. People and 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:

1. Strategic thinking and business acumen.
2. Strong financial analysis and investment evaluation skills.
3. Risk management and compliance expertise.
4. Results-oriented mindset with a focus on achieving targets.
5. Ability to lead and inspire a diverse team.
6. Excellent communication and presentation skills.
7. Strong ethical conduct and integrity.

Academic Background & Relevant Qualifications:

1. Bachelor's Degree in Finance, Economics, Business Administration, or a related field.
2. A master's degree is preferred.
3. Professional certifications such as Chartered Financial Analyst (CFA) or Chartered Institute of Securities & Investments (CISI) qualification would be an added advantage.
4. Proven experience (at least 7 years) in asset management, with a strong understanding of HNWI within the financial markets
5. Have existing relationships that meet the profile of Jubilee client.
6. Proven experience in developing and implementing marketing strategies, managing brand reputation, and executing successful marketing campaigns.

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.