



Job Ref. No. JAML077

Position: Business Development Manager (Retail Distribution)

Jubilee Asset Management Limited (JAML) is a premier Asset Manager that offers differentiated investment products and solutions across core assets, alternative assets and across all market cycles. Our clients include institutions, high net worth individuals (HNWI) and retail clients. Our differentiated investments products and solutions include Insurance Fund Management, [Segregated Portfolio Management](#), [Unit Trusts](#), Alternative Investments, Offshore Investments and Structured Investment Products. For more information, visit <https://jubileeinsurance.com/ke/asset-management/>.

We currently have an exciting career opportunity for **Business Development Manager (Retail Distribution)** within **Jubilee Asset Management Limited**. The position holder will report to the **General Manager -Business Development**.

Role Purpose

The role holder is responsible for driving business growth within the retail distribution segment by developing and executing sales strategies that increase the uptake of Unit Trusts, Retail Investment Products, and Wealth Management Solutions within the Dedicated Financial Advisors & Independent Financial Advisors. This includes strengthening the intermediary networks, optimizing sales performance, and enhancing customer experience. The role also supports client retention, drives channel productivity, and ensures compliance with CMA, RBA, KRA, AML, Data Protection, and internal policies.

Main Responsibilities

Operational Excellence

- Drive acquisition of retail clients for Unit Trusts and Wealth Management solutions through the Dedicated Financial advisory & Independent Financial advisor channels.
- Manage end-to-end sales cycles including prospecting for the intermediary channels.
- Strengthen and support retail distribution channels including Dedicated Financial Advisors, IFAs, brokers and retail partners.
- Implement structured sales routines such as weekly pipeline reviews, lead tracking, and performance dashboards.
- Coordinate client transactions with Fund Services, Operations, and Finance to ensure accuracy and timeliness.
- Conduct retail client education sessions including product demos, financial literacy engagements, and onboarding support.
- Drive cross-selling and upselling initiatives across the retail investment product suite.
- Handle client escalations and ensure issues are resolved within agreed service standards.

Strategic Function

- Develop and execute retail distribution sales strategies aligned with JAML's business growth objectives.
- Identify and cultivate new retail business opportunities, including emerging digital channels.
- Use market intelligence and competitor insights to refine go-to-market plans and improve product positioning.

- Provide input into product development, pricing models, and customer value propositions targeting retail investors.
- Collaborate with Marketing to design and execute campaigns that enhance visibility and conversion across retail channels.
- Support annual budgeting, forecasting, and performance planning for the retail segment.
- Recommend and implement process improvements to enhance productivity and customer experience.
- Contribute to portfolio growth through strategic partnerships, activations, and new distribution initiatives.

Risk & Corporate Governance

- Ensure all retail clients and sales processes comply with KYC, AML, Data Protection, CMA, RBA, and internal policy requirements.
- Identify, evaluate, and escalate emerging risks related to retail channels—including operational, regulatory, conduct, or reputational risks.
- Maintain accurate and complete documentation for all retail sales activities, client files, intermediaries, and partner engagements.
- Ensure proper contract management and governance standards for agents, IFAs, brokers, and other retail distribution partners.
- Support internal and external audits, regulatory inspections, and due-diligence requests, ensuring timely responses and follow-ups.
- Monitor retail sales behaviours to detect mis-selling risks and enforce adherence to compliant, ethical selling practices.
- Maintain confidentiality, professionalism, and integrity in all interactions with clients and partners.
- Prepare and submit required reports including performance dashboards, compliance reports, and management updates.
- Promote alignment to Jubilee’s values, ethics, governance principles, and organizational culture across all retail engagement activities.

Leadership, 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
- Manage, mentor, and develop solution architects and technical teams.
- Promote a culture of continuous improvement, innovation, and strong stakeholder collaboration.

Key Competencies

- Strong retail sales and distribution management
- Excellent communication, negotiation, and relationship-building skills
- Commercial awareness and strategic thinking
- Deep understanding of Unit Trusts and retail investment solutions
- Strong analytical, reporting, and presentation skills
- Knowledge of CRM systems for sales management
- Customer-centric problem solving and decision making

- Ethical integrity and attention to detail

Qualifications

1. Bachelor's Degree in Finance, Economics, Business Administration, Marketing.
2. A Master's Degree is an added advantage.
3. Professional qualifications such as CISI, CFA Level I, or ICPAK/CIMA exposure are advantageous.

Relevant Experience

- Minimum 6–7 years of experience in financial services, including retail distribution, wealth management, or Unit Trust sales.
- Demonstrated success in retail business development and channel management.
- Existing networks within the retail investment ecosystem are highly desirable.
- Strong understanding of the Kenyan financial services market, regulatory landscape, and industry trends.
- Exceptional leadership experience with a demonstrated ability to build and motivate high-performing teams.

**If you are qualified and seeking an exciting new challenge,
please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and
Position by 24th March 2026.**

Only shortlisted candidates will be contacted.