Job Ref. No: JAML 085

Position: Relationship Manager – HNWI

Jubilee Group was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Group has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, Asset Management and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 1.9 million clients. Jubilee Group 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.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Group, 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 Relationship Manager is responsible for driving sustainable business growth by acquiring new clients, growing Assets Under Management (AUM), strengthening client relationships, and delivering exceptional customer experience. The role focuses on developing and managing strategic relationships with individual, corporate, institutional and intermediary clients while identifying opportunities to deepen existing relationships, retain clients, and promote the organization's investment solutions.

The Relationship Manager serves as a trusted advisor to clients by understanding their financial goals, recommending suitable investment products, coordinating internal service delivery, and ensuring timely resolution of client concerns while supporting the company's strategic growth objectives.

Main Responsibilities:

1. Strategy:

Business & Asset Growth

- Develop and execute client acquisition and retention strategies aligned with the organization's growth objectives.
- Grow Assets Under Management (AUM) through JAML strategic partners and expansion of existing client portfolios.
- Identify new market opportunities within strategic partnerships.
- Develop annual business development and portfolio growth plans.
- Promote the company's investment solutions to high-net-worth individuals, corporates, institutions, and intermediaries within the partnership segment.
- Contribute to revenue growth through cross-selling and upselling investment products.

- Support the development of strategic partnerships that expand market reach and increase business opportunities through thorough market research.

Client Acquisition

- Identify, prospect, and onboard new clients through networking, referrals, partnerships, and business development initiatives.
- Develop and maintain a healthy sales pipeline to consistently achieve acquisition targets.
- Represent the company at industry forums, networking events, and client engagement activities.
- Build relationships with key market stakeholders to enhance brand visibility.

Strategic Partnerships

- Establish and nurture relationships with JAML strategic partners.
- Identify partnership opportunities that increase distribution channels and client acquisition.
- Collaborate with internal stakeholders to design value propositions for strategic partners.

2. Operational

- Act as the primary liaison between Partnership and internal departments to ensure seamless service delivery.
- Coordinate onboarding, induction, and integration of new clients within the partnership segment into JAML systems and culture.
- Oversee timely resolution of 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. 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. Risk Management, Compliance and Corporate Governance

- Identify, assess, and escalate client, operational, regulatory, and reputational risks associated with relationship management activities.
- Ensure client onboarding and transactions comply with Know Your Customer (KYC), Anti-Money Laundering (AML), Counter-Terrorism Financing (CTF), and sanctions screening requirements.
- Monitor client activities for unusual or suspicious transactions and escalate concerns in accordance with company policy.
- Promote a strong risk management culture by adhering to the organization's risk appetite and internal controls.
- Safeguard confidential client information and ensure compliance with applicable data protection requirements.
- Support business continuity initiatives by maintaining effective client communication during disruptions.

5. People, Leadership and Culture

- Foster a client-centric culture through professional and ethical conduct.
- Collaborate effectively with Investment, Operations, Finance, Marketing, Compliance and Customer Experience teams to deliver seamless client service.
- Share market intelligence and customer insights to support continuous improvement.
- Participate in product knowledge sessions and continuous professional development.
- Promote teamwork, accountability, and high-performance standards.
- Champion the organization's values in all client and stakeholder interactions.
- Mentor junior colleagues where applicable and contribute to knowledge sharing across teams.
- Support initiatives that enhance employee engagement, diversity, inclusion, and organizational culture.

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:

- Bachelor's Degree in Finance, Economics, Business Administration, or a related field.
- Professional certifications such as Chartered Financial Analyst (CFA) or Chartered Institute of Securities & Investments (CISI) qualification would be an added advantage.
- Minimum of 5-7years of experience in financial services, sales coordination, or relationship management.
- Have existing relationships that meet the profile of Jubilee client.
- Prior experience working with Banks 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 Monday,27th July 2026.