

Investment Advisor at Flexi-Personnel

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Company: JobWebKenya

Location: Kenya

Category: business-and-financial-operations

Job Description

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Job Purpose

Reporting to the Head of Sales and operating in a highly competitive and dynamic environment, the main role of the position of Investment Advisor is to sell investment funds to prospective and existing clients and service the accounts thus created.

Key Responsibilities:

Sell investment products, (i.e., Unit Trust Funds, Wealth Management and International /Off-Shore funds) to prospective and existing individual and corporate clients.

Understand client risk and return profile, identify investment opportunities, provide suitable solutions, and ensure periodic investment portfolio review.

Meet and exceed exciting and aggressive work targets.

Build Rapport with Colleagues, to generate from them successful leads.

Carry out a detailed fact find review of the potential clients and recommend appropriate insurance and investment products.

Keep abreast of developments in local, regional, and global markets, investment products and opportunities.

Liaise with research, Business development, Portfolio Managers, and client service teams for

identifying opportunities to cater to clients' requirements.

Act as a Relationship Manager to his or her portfolio clients i.e., sign-in, manage and retain clients and their accounts and maintain a strong customer service.

Share with the client or prospective clients house views on various asset classes; and explain the rationale.

Plan and attend physical and virtual client meetings.

Competition mapping and augmenting new product development.

Showcase investment products to clients which may be of interest to them, or which are on the approved list.

Explaining key risks and other features of products in which the client wishes to invest and updating the client on the same post sales.

Assist the client in aligning his/her investments as per his/her needs and risk appetite in line with dynamic asset allocation.

Work in a high-pressure, fast-paced environment within an entrepreneurial culture that offers minimum supervision.

Actively promote the brand and image of the company.

Minimum Requirements:

Education, Knowledge, And Experience

An undergraduate degree from a recognized university.

An appropriate qualification/ training in sales and marketing.

At least **5 years** of relevant work experience.

Work experience in the financial services sector, e.g., bank, insurance companies, fund manager, stockbrokers etc., would be an advantage.

Proven experience and success in selling financial services products: experience of selling unit trust investment products would also be an added advantage.

A good working knowledge of financial markets and financial products.

A high sales drive and a strong will to succeed.

Confident, articulate and with strong communication skills.

Results oriented with ability to work under strict deadlines and meet sales targets.

Well groomed, presentable, and strong interpersonal skills.

Highly networked and adept at connecting with people, and with good experience of the Business environment of the preferred region.

Ability to thrive in a high-pressure, fast-paced environment with minimum supervision.

Other Details

The role offers attractive commission and bonus structures.

Highly commission-driven individuals are urged to apply.

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