



# POTENTIA

## The organisation

Our Client, listed on the Namibia Stock Exchange, is a leader in the financial services sector specialising in asset management. Managed by a small team of professional individuals and with strategic business alliances in South Africa, the company specialises in the provision of financial products and unit trusts to both institutional and personal investors, primarily through financial brokers and Independent Financial Advisors (IFA's). Their portfolio includes the management of institutional assets belonging to pension funds, provident funds and medical aid schemes, with exposure to local and international financial markets offering a range of segregated and pooled products. As a dynamic Namibian owned company, our Client actively pursues the vision to be "The Guardian of the Wealth of Namibia" through investing and managing clients' funds to harvest high returns and growing the net wealth whilst minimising risk. The company is passionate about Namibia and the wealth of its individual and corporate citizens and channels its skills, knowledge and experience towards improving their economic welfare through carefully selected investment vehicles; simultaneously nurturing and imparting investment knowledge and understanding to its' Clients. The company has established a reputation for strong and consistent investment performance as well as exceptional customer service enhanced by tailor-made business relationships.

In order to sustain the existing pool of customers and organically increase the portion of the Client's book that they service, including obtaining new customers; it has become imperative for our Client to solicit the services of a dynamic, performance-driven individual to fill the position of Investment Specialist. A formally structured, multi-tier remuneration package based on individual and organisational performance is on offer to the right candidate.

## INVESTMENT SPECIALIST – PERSONAL INVESTMENTS

Windhoek, Namibia

## The position

The main objective of your role will be to support the sale of retail products through Linked Investment Services Providers, broker consultants and IFA's. With a passion for investment products, you will be required to demonstrate the desire and ability to market both the product and the organisation by providing factual information and through client engagement, subsequently aligning customer needs to the organisation's products. The distinctive marketing methodology employed is to ensure that the interest of the client is at all times preserved by informing the client, and ensuring that the client is aware of how best to manage their investment risk and by underscoring the philosophy of the organization (i.e. long-term investing and a valuation-driven investment philosophy). The incumbent will be required to drive this philosophy with integrity, ensuring that the investor makes an informed decision resulting in an optimal investment allocation which meets their stated requirements.

The position requires an upwardly mobile individual with an insatiable capacity to go through continuous learning processes. A management position with a seat on the Executive Committee, this role requires the incumbent to collaborate extensively with fellow colleagues, attending sales meetings and engaging on a regular basis so as to remain abreast of new products and developments in the financial services sector. A significant amount of travelling will be required, which includes monthly visits to South Africa and client visitations within Namibia.

In order to facilitate the sale of financial products, the individual must present an extroverted and amiable character with the natural ability to foster and manage meaningful, trusting and mutually beneficial business relationships through extensive networking and client engagement. A critical and independent thinker, the incumbent must be able to challenge the status quo in a respectable and professional manner, adding value through constructive contribution. Because this role deals with clients' funds, it is important that the individual be highly principled, presenting impeccable integrity both professionally and socially at all times. The role requires the application of good judgement and wisdom, with customer satisfaction being the underlying factor.

### Key areas of responsibility:

The daily activities of the incumbent will include (but will not be limited to) the following:-

- **Relationship Management:** Client visits including presentations to groups of clients and broker networks, sometimes accompanied by an Investment Manager; in order to service a client base situated in major centres in Namibia.
- **Marketing:** Marketing of unit trust products through presentations and one-on-one engagements, as well as responding to customer queries. Proactive marketing strategies must be employed in order to pre-empt customer investment needs and present the client with the possible investment options on offer.
- **Leadership:** As a senior team member, creates and sets goals, which integrate the diverse needs of the group and motivates individual team members to perform optimally by creating the ideal climate that promotes productivity, creativity and standards of excellence.
- **Communication:** Preparation of regular communication to clients including reporting and explanation of performance;
- **Portfolio enhancement:** Growing assets from existing clients and identifying new avenues for business. Pro-actively analysing client's businesses to determine suitability of products for their requirements;
- **Account management:** Communication and management of client accounts – starting with a client base of varying sizes, then growing them over time;

- **Market intelligence:** Keeping abreast of industry and competitor trends as well as investment markets so as to be able to engage clients on current affairs;
- **Administration:** Maintain and consistently update client database through effective use of MIS systems.
- **Coaching and day to day staff management:** Coach and assist team members with the administration of clients' portfolios and attending to customer inquiries

#### Minimum requirements:

- A B.Com degree and/or a Legal qualification with a bias to Commerce/Investments would be a distinct advantage.
- General understanding of the financial services industry plus specific knowledge of the investment sub-sector is a key requirement.
- At least 2 years proven experience within the asset management, IFA, insurance or linked product markets. Other relevant experience will also be considered.
- CFP is a critical requirement for the job. If not already certified, the individual will be obliged to obtain this qualification upon appointment to the job.
- The ability to establish and maintain good relationships with clients is a must for this role.
- The ability to service Afrikaans speaking IFA's and clients is an advantage, but not critical.
- Knowledge of MS Office suite of products and Client database experience is an advantage.
- The candidate should have a valid driver's license with own car.

#### Competency requirements

- **Integrity** – The capacity to show consideration and concern; to be honest; to earn the respect of others; to adhere to broad ethical rules and guidelines by showing fairness, impartiality and congruency in all respects; to reflect and apply moral decency; to be trustworthy, responsible and reliable; to be committed to basic principles of decency.
- **Personal development** - Showing a willingness to learn, taking responsibility for own development and seeking opportunities for acquiring new skills and knowledge.
- **Presentation** - Make presentations to internal or external groups in a way that effectively conveys information and/or intent.
- **Analytical** - Emphasis on accuracy, precision and thoroughness. To be trustworthy, consistent, objective; to persevere; a good listener; attention to detail; compares facts; works according to definite, set plans; takes quality decisions; sticks to a point.
- **Judgement** - Evaluating and judging situations or alternative courses of action against rational, logical assumptions, insight or standards.
- **Excellence orientation** - Displaying pride in and derive personal satisfaction from achieving results, commitment to uncompromising standards of excellent and continuous improvement and determination or self-discipline in completing what has been started.
- **Innovative** - Being open to other's ideas, initiating change, improvising or modifying existing ideas and showing a willingness to experiment in order to ensure ongoing improvement.
- **Expressive** - To be socially responsive, to think on one's feet; to reflect vision; to be able to put one's case verbally and to inspire; to be enthusiastic and to promote enthusiasm and spontaneity; to be very adaptable; to be open-minded; eager to experiment; flexible; optimistic.
- **Motivation** – An energetic self-starter, having the drive to achieve, persevere, to strive toward definite goals, , to take appropriate steps of his / her own accord.
- **Planning & Organising:** The ability to properly articulate, arrange and prioritise work schedules so as to meet the demands of a specific project.
- **End customer orientation:** Ensure all project activities are geared towards superior customer satisfaction.
- **Analytical Skills:** The ability to analyze information, detect patterns and relationships, and solve problems on a complex, intangible level.

#### **Interested?**

Our client offers an attractive package commensurate with qualifications and experience. The closing date is **14 October 2016**. We request that you e-mail your CV to [theo@potentia.com.na](mailto:theo@potentia.com.na) for the attention of **Ms Theophilia Shikongo**. **All applications will be handled exclusively by Potentia, and all selected candidates will be required to undertake an assessment test. Note: Only electronic CV's will be accepted.**