



WE ARE HIRING

Bancassurance Finance Specialist

REPORTING TO:

Head of Bancassurance

DEPARTMENT:

Retail

RESPONSIBLE FOR:

Bancassurance Financial Operations

REGION:

Dar es Salaam

HOURS OF WORK

8am - 5pm Monday to Friday.
Additional hours as required by workload.



Call 0800 780 111 or visit www.eximbank.co.tz



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1. PURPOSE OF JOB

Participating in the development and implementation of the sales and underwriting of insurance covers, in line with the bancassurance objectives. Provision of efficient and effective insurance services. This includes ensuring that all assigned client related matters are dealt within the expected timeframes. Provision of specialist advice and support to the team including business retention thus achieving the delivery of the Business Budget as well as ensuring sustainable and profitable business operations

2. KEY ROLE AND RESPONSIBILITIES

- Responsible for audit matters regarding Bancassurance affairs and finance related audits.
- Preparation of commission invoices after confirmation of premium paid and commission rate with insurance companies.
- Income Posting (CBS) in respective GLs.
- Weekly review of GL report for posted commission Income to ensure accuracy and completeness.
- Reconciliation of all commission income related GLs as per set SOPs.
- Ensure timely collection of commissions from Insurers and properly posted in the system (CBS).
- Reconciliation of withholding tax paid.
- Monthly report of Bancassurance premium and commission income for both Retail Banking and CIB.
- Suppliers' payment processing and managing supplier payable
- Perform GL reconciliations by ensuring accuracy and timely submission as per set standards and agreed timelines.
- Perform cost analysis to ensure accurate posting and adequate monthly accruals.
- Posting of all daily, month-end and audit adjustments ensuring correct entries as well as properly supported.
- Perform month end activities including accrual and provisions of all monthly costs.
- GL monitoring by reviewing GL parameters and ensure existence of controls as per set SOPs.
- Assist in performing Tax activities as per allocated activities.
- Accountable for achieving annual income collection targets as cascaded from Head of Bancassurance.
- Ensure timely collection of commissions from Insurers and performing commission reconciliations as per the set standards.
- Manage customer's queries and complaints by taking ownership and resolving in a timely manner. Act as the escalation point for their unresolved queries and complaints.
- Monitoring of progress towards achieving targets is done on weekly to monthly basis.
- Internal: Regular contact with all Branches & Departments
- External: Regular contact with existing, new customers and insurance companies.



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3 COMPETENCIES

- A good understanding of the market dynamics and customer attributes.
- Analyzing, planning, organizing, Learning & Researching.
- Achieving Personal Work Goals and Objectives.
- Entrepreneurial and business acumen.
- Knowledge of regulatory framework within the banking & insurance environment.
- Ability to professionally interact with external and internal stakeholders.
- Ability to work independently or as a part of a team.
- Ability to accommodate operational and functional ambiguity and change.
- Proven ability to influence others and to achieve tangible business result while incorporating compliance processes, systems and resources into all aspects of corporate operations.
- Demonstrated integrity and ethical standards

4 QUALIFICATION AND SKILLS

- Bachelor 's degree or its equivalent in insurance, bank, risk management, law, actuarial science, finance, Business Administration or related field from recognized institution
- Minimum of 3 years' work experience in the Insurance Industry with a key focus on Operations, Underwriting and Claims
- Minimum requirement certificate in insurance/CoP
- Excellent knowledge of insurance products and processes, regulatory requirements as well as ability to drive business performance and revenues
- Good understanding of customer segmentation and needs as well as an in-depth knowledge of distribution channel strategies
- Sworn Declaration of good character and solvency.
- Strong passion and understanding of the insurance industry and its regulatory environment.
- Demonstrated capacity to lead, coach and supervise team members effectively
- Excellent communication and interpersonal skills, with experience of dealing with executives and clients at all levels including the capacity to articulate risk management, insurance products & policies, underwriting & audit in the language of business.
- ACII would be an added advantage.



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5 OTHER

- Carry out work in accordance with the bank's procedures.
- Perform the assigned tasks with due diligence.
- Eliminate waste of whatever form, suggest the use of new practices and contribute to the continuous improvement of the bank.

Please send your application to:
hrrecruit@eximbank.co.tz

NB: Only short - listed candidates will be contacted

Application deadline:- **11th January 2024**



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WE ARE HIRING

Assistant Relationship Manager - Bancassurance

REPORTING TO:

Manager General Insurance

DEPARTMENT:

Retail

RESPONSIBLE FOR:

Bancassurance Sales

REGION:

Zanzibar

HOURS OF WORK

8am - 5pm Monday to Friday.
Additional hours as required by workload.



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1. PURPOSE OF JOB

The job holder is responsible for participating in the development and implementation of the sales and underwriting of insurance covers, in line with the bancassurance team's objectives. Provision of efficient and effective insurance services. This includes ensuring that all client related matters are dealt within the timescales. Provision of specialist advice and support to the team including business retention thus achieving the delivery of the Business Budget as well as ensuring sustainable and profitable business operations.

2. KEY ROLE AND RESPONSIBILITIES

- Co-ordinate all Bancassurance activities conducted within the allocated in Zanzibar.
- Handle retail and CIB portfolio with the new and renewal business in Zanzibar, targeting Medical, General and life business.
- Maintaining, Generating, and managing existing and new businesses by contacting potential clients to establish rapport and arrange meetings.
- Negotiating Insurance terms with Insurers and provide competitive quotes and proposals.
- Analyze and assess proposal forms and risk notes and confirm correctness within the acceptable underwriting standards.
- Work on the allocated renewal scrutiny listing 2 months prior to expiry of policy and dispatch renewal notices to clients prior to renewal date.
- Attend to direct customers who visit the office for inquiry and provide prompt attention and efficient service.
- Provides guidance and training to bank staff and bancassurance champions on insurance matters in Zanzibar.
- Perform periodical service visits to client.
- Claims follow up and update clients.
- Monitoring of progress towards achieving targets is done on a monthly basis and preparing weekly and monthly reports.
- Participate in formulating and implementing any marketing activities and promotions.
- Ensure timeliness of quotations, invoicing, timely dispatch and tracking of documents to the Branches and to the respective customers.
- Accountable for achieving annual income targets as cascaded from Manager General Insurance.
- Ensure timely collection of commissions from Insurers and performing commission reconciliations as per the set standards.
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3 COMPETENCIES

- Excellent knowledge of insurance products and processes, regulatory requirements as well as ability to drive business performance and revenues
- Analyzing, planning, organizing, Learning & Researching.
- Achieving Personal Work Goals and Objectives.
- Entrepreneurial and business acumen.
- Knowledge of regulatory framework within the banking & insurance environment.
- Ability to professionally interact with external and internal stakeholders.
- Ability to work independently or as a part of a team.
- Ability to accommodate operational and functional ambiguity and change.
- Proven ability to influence others and to achieve tangible business results whilst adhering to internal compliance and regulatory requirements in all aspects of corporate operations.
- Demonstrated integrity and ethical standards

4 QUALIFICATION AND SKILLS

- Bachelor 's degree or its equivalent in insurance, bank, risk management, law, actuarial science, finance, Business Administration or related field from recognized institution
- Minimum of 3 years' work experience in the Insurance Industry with a key focus on Operations, Underwriting and Claims
- Minimum requirement certificate in insurance/CoP
- Excellent knowledge of insurance products and processes, regulatory requirements as well as ability to drive business performance and revenues
- Good understanding of customer segmentation and needs as well as an in-depth knowledge of distribution channel strategies
- Sworn Declaration of good character and solvency.
- Strong passion and understanding of the insurance industry and its regulatory environment.
- Demonstrated capacity to lead, coach and supervise team members effectively
- Excellent communication and interpersonal skills, with experience of dealing with executives and clients at all levels including the capacity to articulate risk management, insurance products, policies and underwriting in the language of business.
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2. KEY ROLE AND RESPONSIBILITIES

- Co-ordinate all Bancassurance activities conducted within the allocated in the Norther Zone.
- Handle retail and CIB portfolio with the new and renewal business in the Norther Zone, targeting Medical, General and life business.
- Maintaining, Generating, and managing existing and new businesses by contacting potential clients to establish rapport and arrange meetings.
- Negotiating Insurance terms with Insurers and provide competitive quotes and proposals.
- Analyze and assess proposal forms and risk notes and confirm correctness within the acceptable underwriting standards.
- Work on the allocated renewal scrutiny listing 2 months prior to expiry of policy and dispatch renewal notices to clients prior to renewal date.
- Attend to direct customers who visit the office for inquiry and provide prompt attention and efficient service.
- Provides guidance and training to bank staff and bancassurance champions on insurance matters in the Norther Zone
- Perform periodical service visits to client.
- Claims follow up and update clients.
- Monitoring of progress towards achieving targets is done on a monthly basis and preparing weekly and monthly reports.
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- Ensure timeliness of quotations, invoicing, timely dispatch and tracking of documents to the Branches and to the respective customers.
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