

VACANCY NOTICE

Pearl Bank is a commercial Bank whose purpose is fostering prosperity for Ugandans. Our high impact goals are driving sustainable financial inclusion and stimulating entrepreneurship and service. In line with our continued growth, the Bank is pleased to offer an exciting career opportunity to competent and results-driven employees and members of the public to apply for the vacant role.

POSITION DESCRIPTION

JOB TITLE: HEAD WEALTH MANAGEMENT

REPORTS TO: CHIEF RETAIL OFFICER

JOB PURPOSE

- To drive the growth and profitability of the Bank's High Net Worth and Personal Banking segment by leading the design and execution of wealth management strategies, overseeing client acquisition and portfolio management, and delivering tailored financial solutions.

KEY RESPONSIBILITIES /KEY DELIVERABLES

High Net worth Individuals (HNI) acquisition & relationship management

- Develop and execute a comprehensive HNI Banking strategy aligned with the Bank's Retail Banking Strategy.
- Lead the acquisition of high-value clients through leveraging networks, partnerships, and referrals.
- Oversee relationship management standards and client engagement models to ensure customer satisfaction.
- Ensure delivery of personalized, high-quality advisory services which address the needs of the target market.
- Maintain direct relationships with key strategic clients.
- Build and manage relationships with corporates, institutions, and organizations in a bid to grow the portfolio.
- Design workplace propositions that are customer focused.

Performance

- Drive growth in Assets Under Management (AUM) and liabilities (deposits, investments) for the Bank's High Net Worth and Workplace Banking segment.
- Monitor performance of the segments in terms of profitability and optimize portfolio performance to deliver on set targets.
- Collaborate with the Products team to refine and deliver competitive solutions for customers under the HNI & workplace banking segments.

Risk Compliance and Governance

- Ensure robust Know Your Customer (KYC), Anti-Money Laundering (AML), and Counter-Terrorism Financing (CTF) standards are maintained for all HNI clients.
- Oversee Enhanced Due Diligence (EDD) for high-risk and Politically Exposed Persons (PEPs) within the HNI portfolio.
- Ensure strict confidentiality and protection of HNI client information in line with data privacy laws and bank policy.
- Maintain high standards of security and discretion in handling client financial information.

Stakeholder Management

- Develop and manage strategic partnerships with investment managers, fund managers, insurers, trustees, legal advisors, and other ecosystem partners to expand wealth offerings.
- Build and sustain trusted relationships with HNI and ultra-HNI clients to understand evolving financial needs and deliver tailored wealth solutions.
- Collaborate with Credit and Risk teams to structure/tailor bespoke lending and investment solutions for HNI clients.
- Ensure that agents and merchants adhere to KYC, AML, and Bank policies.
- Monitor for suspicious activities and report accordingly to guard against fraud.

Campaigns & Activations

- Lead the implementation of recruitment strategies to grow the network of agents, super agents and merchants across their assigned territory.
- Coordinate and execute field campaigns and promotional activities to support agent and merchant acquisition, ensuring strong brand visibility and effective engagement in assigned areas.
- Manage team performance against set targets and service standards.

Team Leadership

- Lead and manage both HNI Relationship Managers and Workplace Banking teams.
- Drive and cascade a strong sales, advisory, and relationship management culture.
- Set and monitor performance targets for the team.

BUSINESS BEHAVIOURS

- Passion:** Committed to excellence, delivering outstanding results and making a positive impact on our customers and stakeholders.
- Teamwork:** Collaborates, mutual respect, and diverse perspectives, to achieve shared success and deliver greater value to the Bank.
- Integrity:** Uphold honesty, transparency, and accountability, ensuring ethical practices in every action.
- Innovation:** Embrace creativity and forward-thinking, continually seek new solutions to enhance customer experience and drive business growth.

QUALIFICATIONS, EXPERIENCE AND COMPETENCIES REQUIRED

- A bachelor's degree in a business course or any related degree.
- A professional certificate/Masters degree is an added advantage.
- A minimum of Eight (8) years' experience in sales with a proven track record to deliver results of which five (5) should have been at a senior management level.
- Proven expertise in high-net-worth client relationship management, sales strategy development, and financial analysis is critical.

THE FOLLOWING DOCUMENTS SHOULD ACCOMPANY THE APPLICATION

- Cover letter, Detailed CV, and Copies of academic documents all as **one file**.

MODE OF APPLICATION

- Online applications addressed to **Chief People & Strategy Officer**, Pearl Bank Uganda.
- Send application to **hr@pearlbank.com** with job title as subject.
- Closing Date: **Monday 15th June 2026 at 5:00pm**.
- Only shortlisted candidates will be contacted.

Pearl Bank Uganda Ltd is an equal opportunity employer