



**TRAINERS &
CONSULTANTS
PRE-QUALIFICATION
TEMPLATE**

COMPANY PROFILE



Madison Investment Managers Limited is an innovative and customer centric financial services Company incorporated in 2001. Madison is licensed and regulated by both the Retirement Benefits Authority (RBA) and the Capital Markets Authority (CMA) as a Fund Manager.

The Company is currently providing fund management, training and advisory services to various corporate clients across the country. The total funds under management is over **KES. 13 Billion**.

Our Training and Advisory services target corporate customers who have a quest for creating a learning organization. Our services drive differentiation and offer long-term solutions that promote knowledge transfer and strong financial performance to our customers.

Our talented team of professionals in the areas of Investment Management, Training and Advisory services are the easiest people to work with, they possess a wide breadth of industry experience to offer smart business solutions while embracing technology, a culture of innovation, collaboration and client focus.

WE SPECIALIZE IN THE FOLLOWING FLAGSHIP PRODUCTS AND SERVICES;



OUR SERVICE OFFERING:

- Unit trusts
 - Pension Fund Management
 - Wealth Management
 - Customized Trainings Programs
 - Advisory Services
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PRODUCTS PROFILE:

- Money Market Fund
 - Fixed Income Fund
 - CIS Wealth Fund
 - Segregated Funds
 - Pension Funds
 - Training and Advisory
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OUR VISION

“To be the leading Investment Management Company in East Africa, offering tailor-made investment solutions to our clients”.



OUR MISSION

“To serve, grow and protect the Wealth of our clients”.

PREAMBLE

Madison Training and Advisory invites bids for pre-qualification of Professional trainers and consultants in different thematic areas seeking to join a pool of trainers who will offer customized trainings and advisory services on behalf of the organization.

Who we are

Madison training and advisory is a unit under Madison Investment Managers (MIM) Accredited by NITA to provide training and advisory solutions to various corporate entities.

Madison's unique expertise and training techniques are structured to ensure that both the organization and employees are equipped with the necessary tools and strategic work plan to deliver value and possess a competitive edge in the business environment.

Our primary objective is to assist organizations;

- **Formulate viable plans to meet their short to long term investment objectives**
- **Innovatively run operations and Increase productivity**
- **Close skill and knowledge gaps**
- **Develop, adopt and implement right strategies**

1. PERSONAL INFORMATION

Trainer's Contact Details

Name of Consultant	
Postal Address	
Physical Location of the Office	
Official email Address	
Office telephone / Mobile number	

2. TICK YOUR AREA OF EXPERTISE AND INDICATE YEARS OF EXPERIENCE

Topic	Kindly tick your area of expertise (✓)	Years of experience
Training Areas		
a) Financial Planning		
b) Investment and Treasury Management		
c) Leadership & Staff Development		
d) Retirement Planning		

Advisory Areas		
a) Advisory on Investment Policy Statement (IPS)		
b) Balance Sheet Management		
c) Strategic Planning, Formulation and Measurement		
d) Organizational Change Management		
e) Risk and Compliance		

3. LIST YOUR EXPERIENCES ON TRAINING/ADVISORY SERVICES IN RELATION TO (2) ABOVE

	Year you trained	Organization	Services Offered
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

4. SUBMIT THE FOLLOWING DOCUMENTS WITH THIS DULY FILLED FORM TO jackline.kibii@madison.co.ke

- **Your Profile**
- **Curriculum Vitae**
- **ID Copy**
- **Copy of KRA Pin**
- **Passport Photo Size**
- **Recommendation Letters**

For any inquiries You can Contact:

Jackline Kibii

Assistant Manager, Training and Advisory;

jackline.kibii@madison.co.ke

Cel: 0722 890 017