



Diversity Survey

ICAEW PROBATE DIVERSITY SURVEY 2023

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Survey undertaken March 2023

Summary

Every two years, all firms accredited for probate services are required to collect, report and publish diversity data about their employees, under the regulatory functions of the Legal Services Act 2007.

In March 2023, our employees were invited to anonymously complete the survey supplied by the ICAEW, using a third-party provider. We received a completion rate of 65% (71 employees) and as a result, the figures reflect the demographics of some but not all M+A employees. We have grouped some of the responses together to avoid identifying our employees.

The results indicate that those completing the survey were broadly white and heterosexual, and half of the employees (51%) are married. In addition, 7% would consider themselves to have a disability.

Of those completing the survey, 61% of our employees are aged between 25-44, with a further 30% above 45 and 8% below 24. 69% of our employees are female and we don't have any employees who identify with a different sex than that assigned from birth.

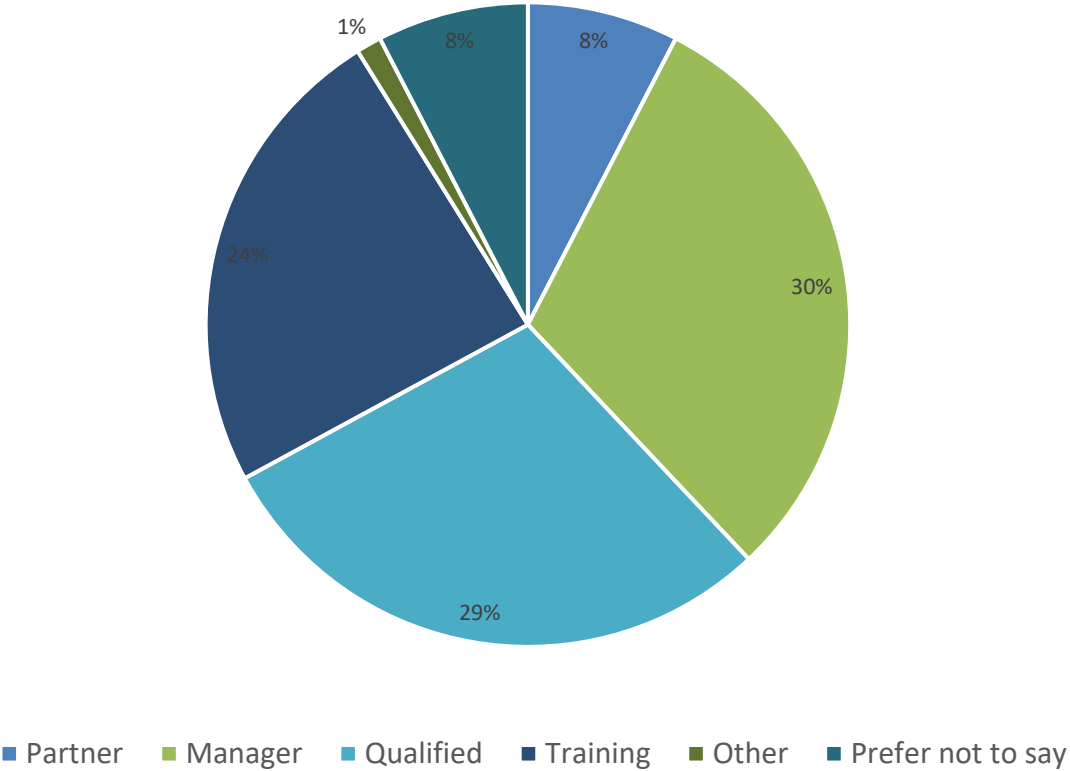
82% of employees attended state school and 17% of employees attending an independent school. 87% of employees have achieved A level qualifications or a degree. This is an excellent reflection of the career progression we promote within the Firm for continued learning and qualifications and that it is possible to have a career for life with us, even from school leaver or graduate age.

11% said that they had taken maternity or paternity leave in the last 5 years and 100% of these employees returned to work for us. 27% of our employees are the primary carer for a child under 18 years old and 12% of our employees give some support to family members every week.

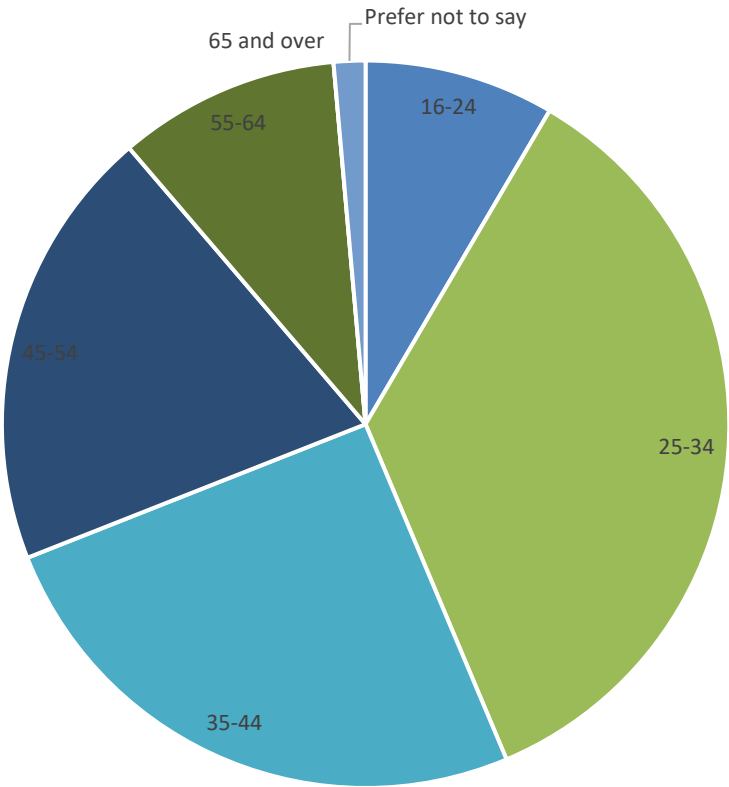
The survey asked employees to answer questions on their personal role, age, sex and gender, disability information, ethnic group, faith, sexual orientation, socio-economic background, social mobility and caring responsibility.

The below graphs have been produced directly from the data received from the third party.

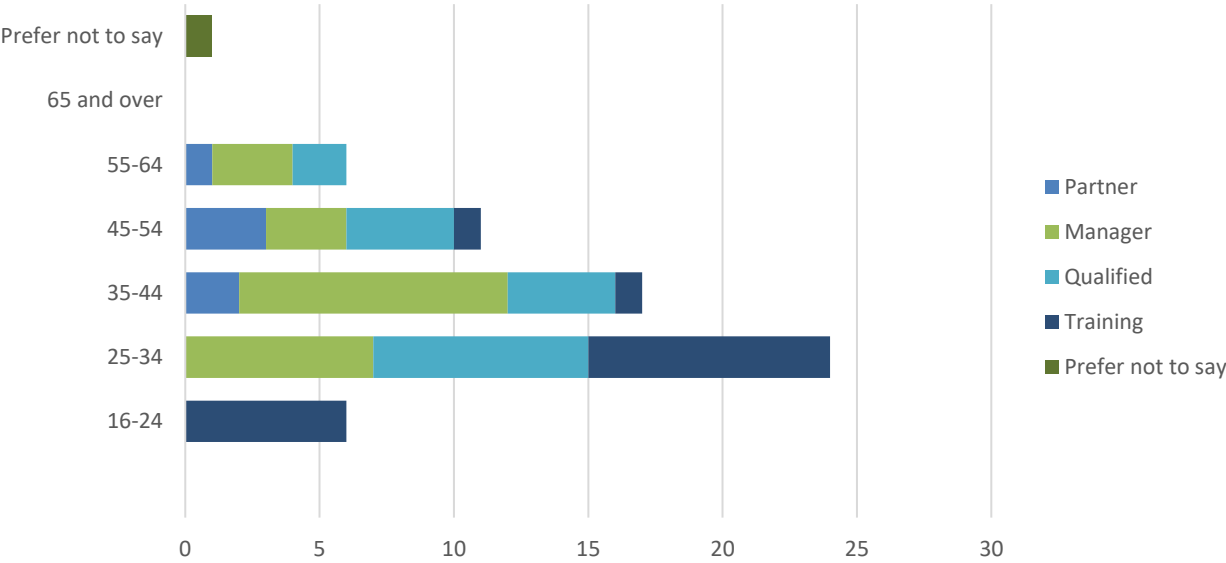
1. About you



2. Age

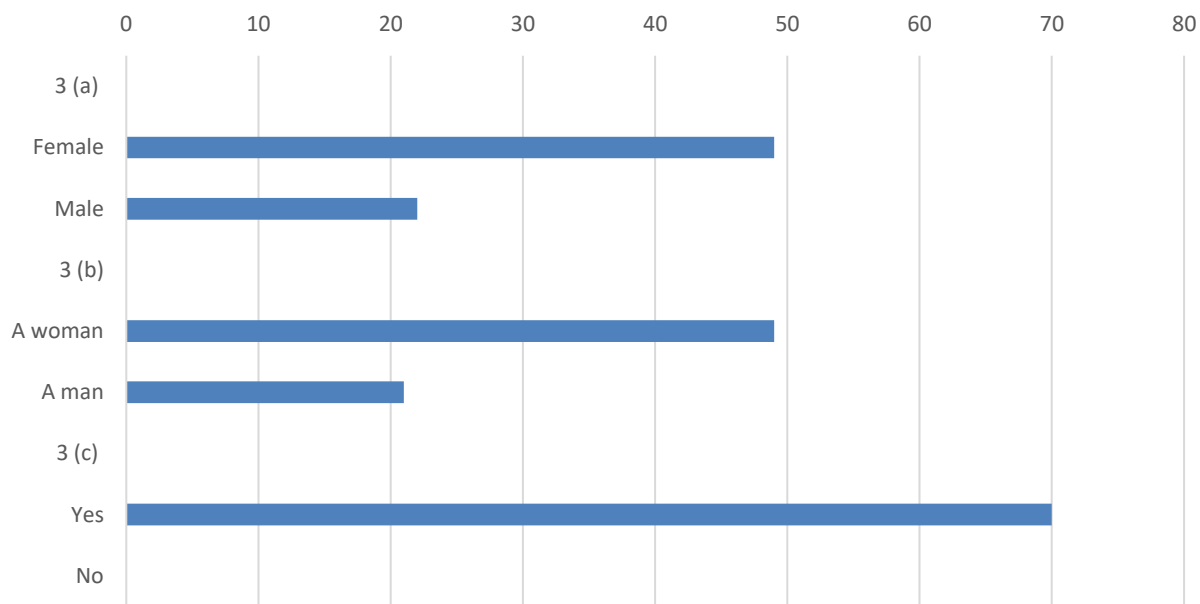


Breakdown by Role

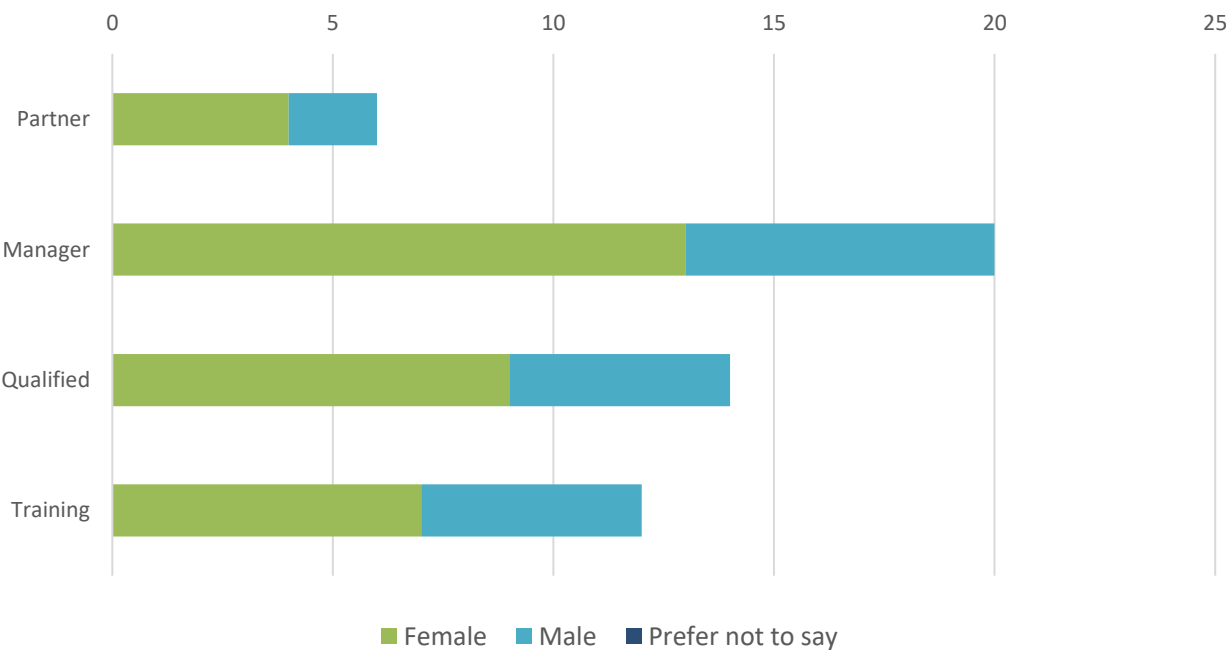


3. Sex/ Gender

- (a) What is your registered sex at birth?
- (b) Which gender do you identify with?
- (c) Is the gender you identify with the same as your sex registered at birth?

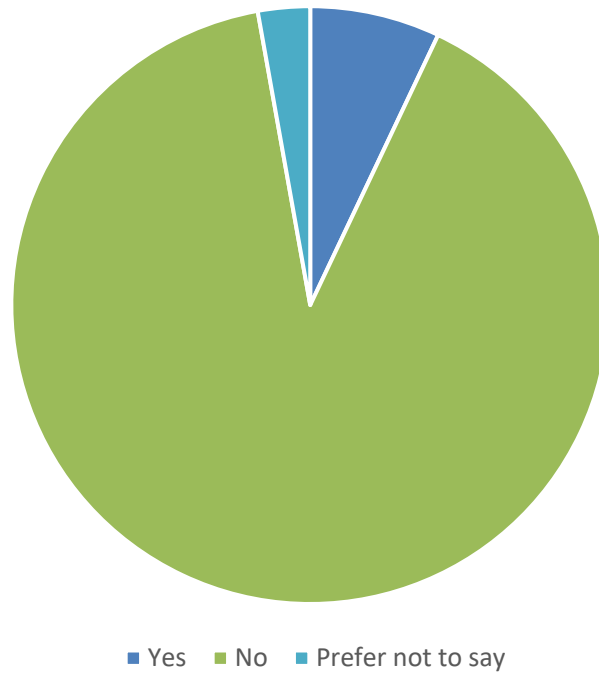


Breakdown by Role

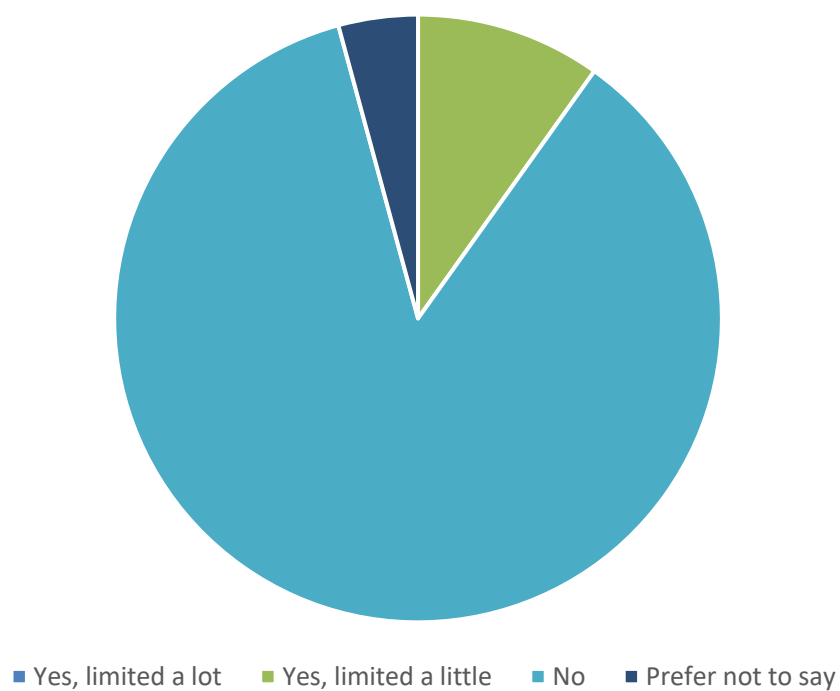


4. Disability

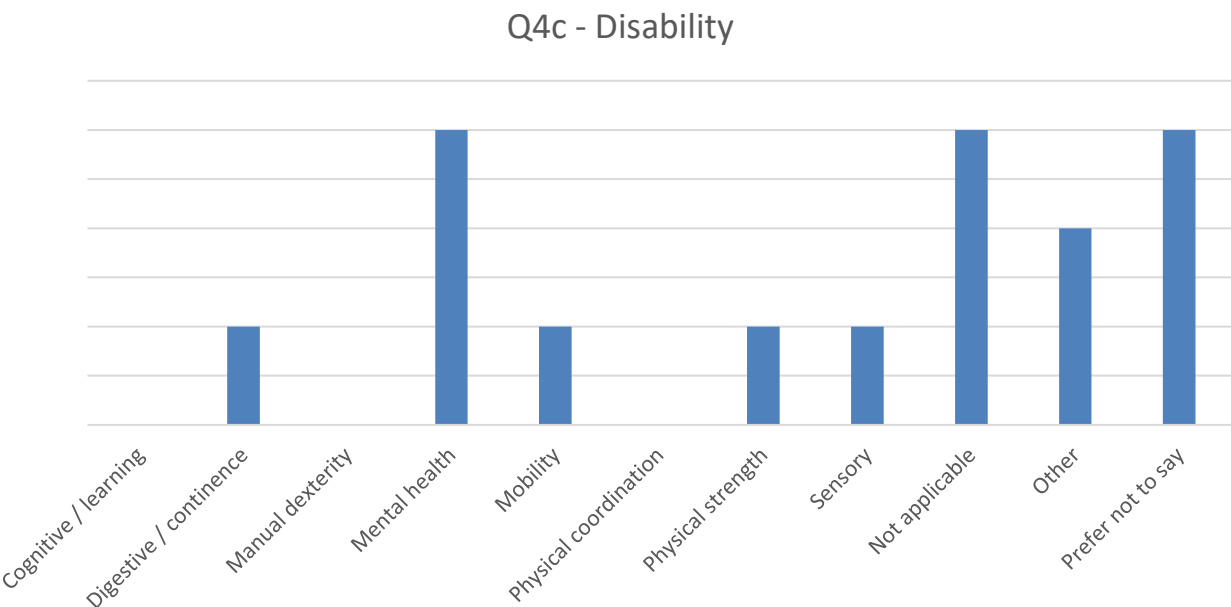
(a) Do you consider yourself to have a disability according to the definition in the Equality Act?



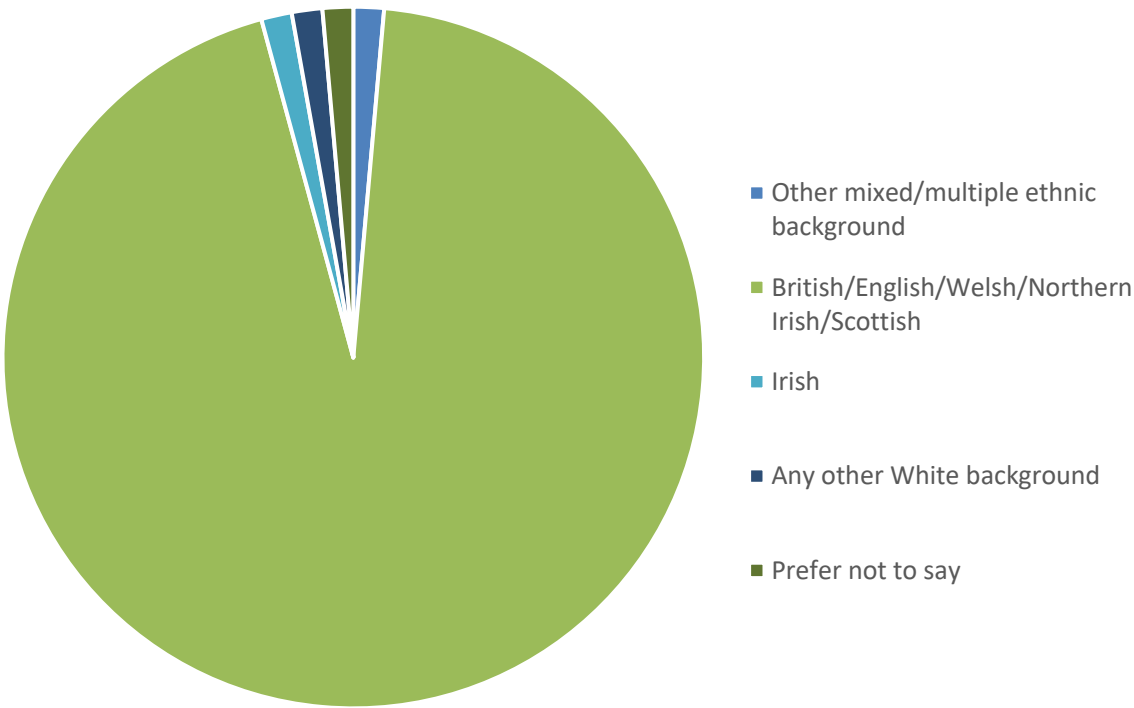
(b) Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?



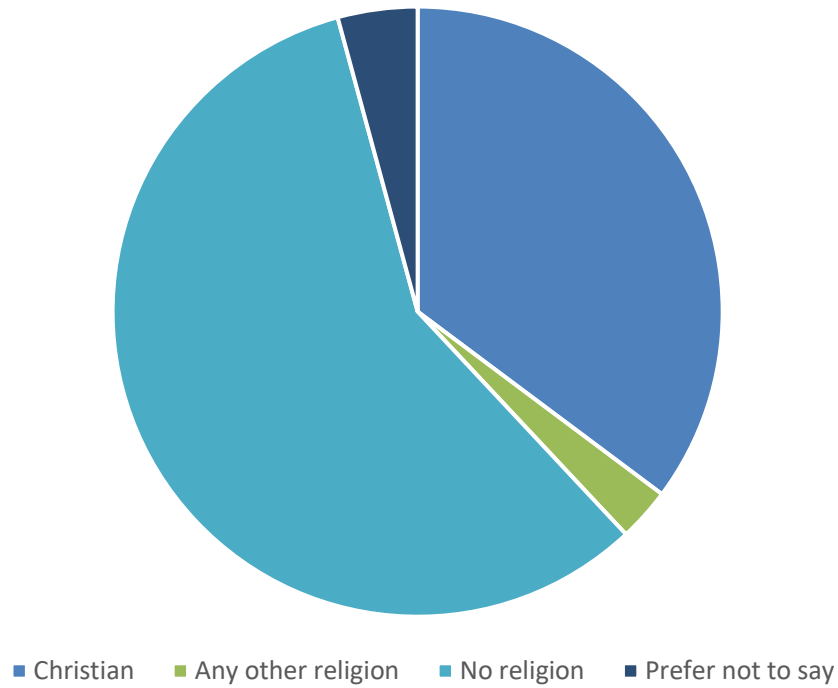
(c) If you have answered “Yes” to any of the previous two questions please identify which of the below health problems or disabilities apply?



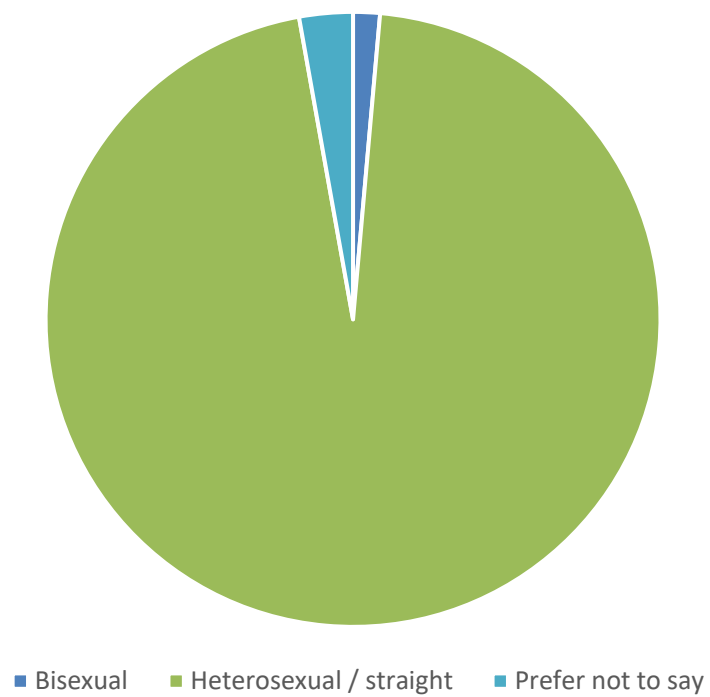
5. Ethnic Group



6. Faith

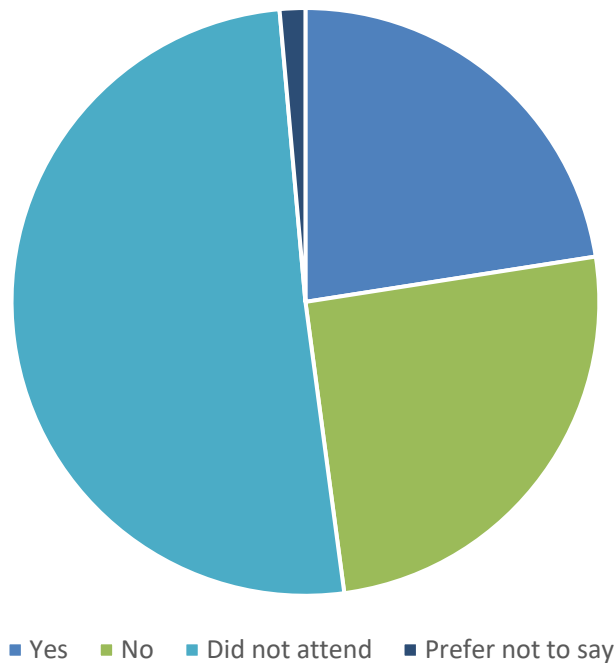


7. Sexual Orientation

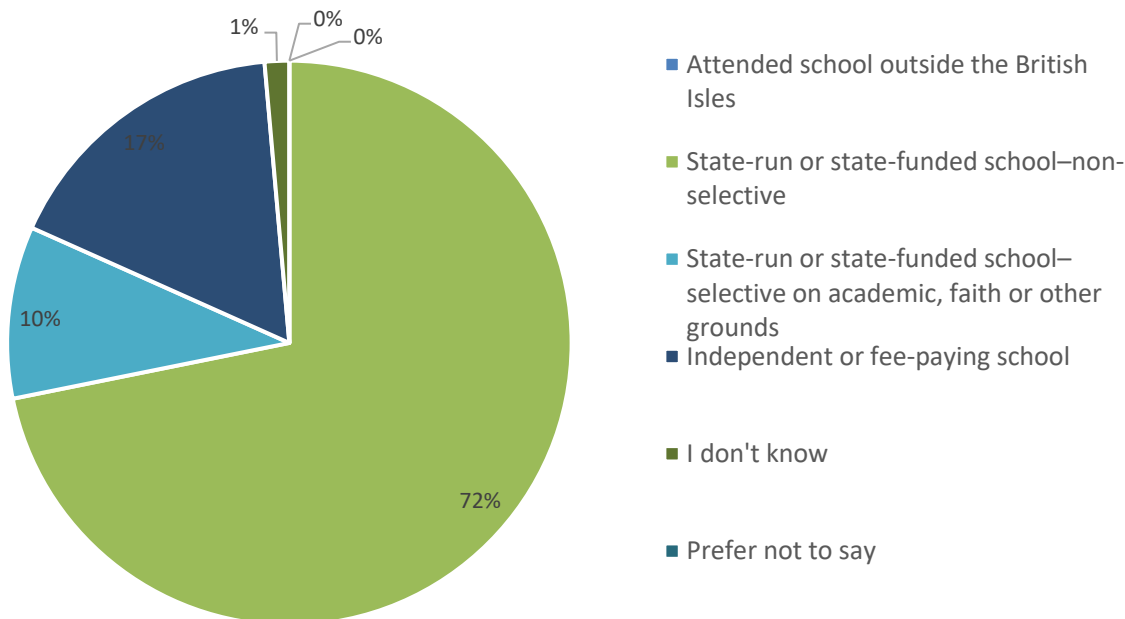


8. Socio-economic background

(a) If you went to university (to study a BA, BSc course or higher), were you part of the first generation of your family to do so?

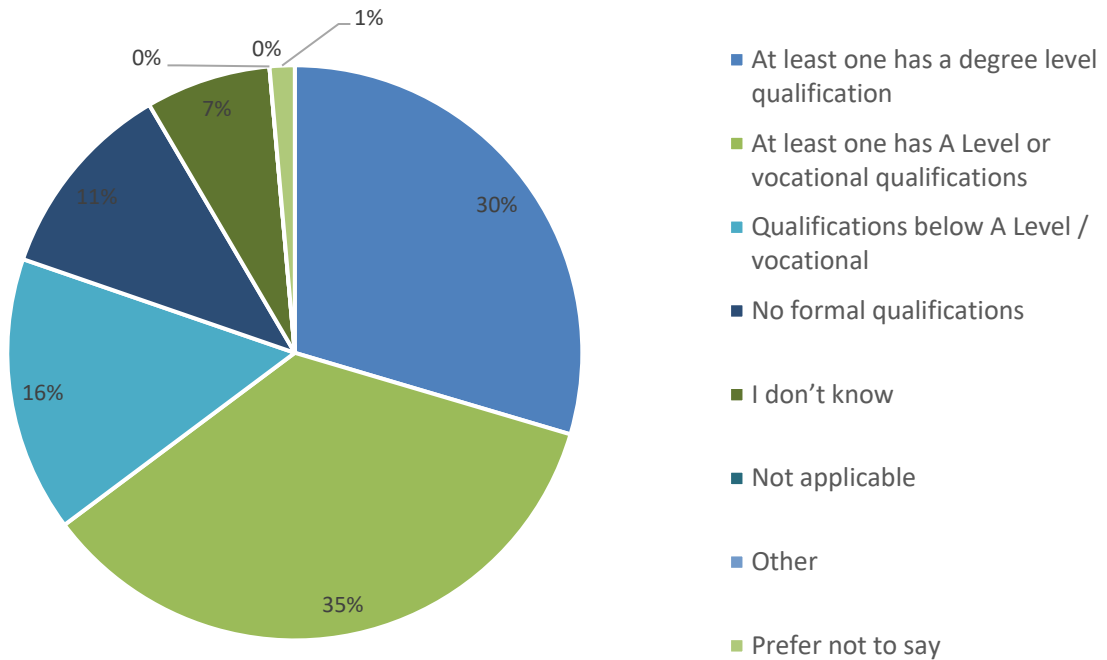


(b) What type of school did you mainly attend between the ages of 11 and 16?

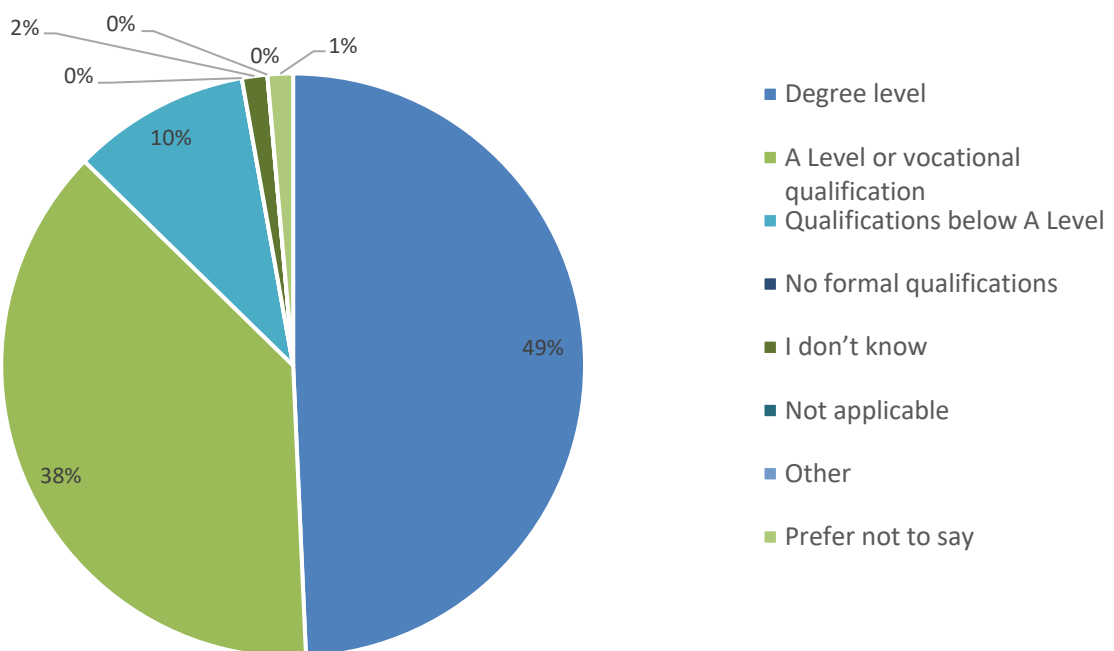


9. Social Mobility

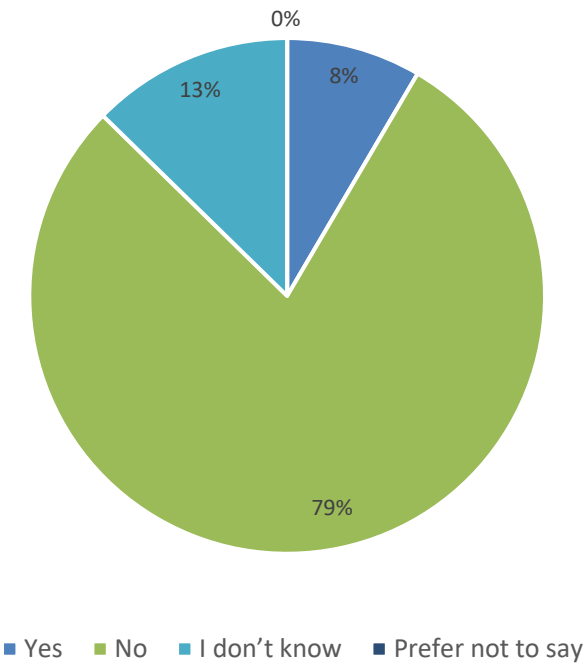
(a) What is the highest level of qualification achieved by either of your parent(s) or guardian(s) by the time you were 18?



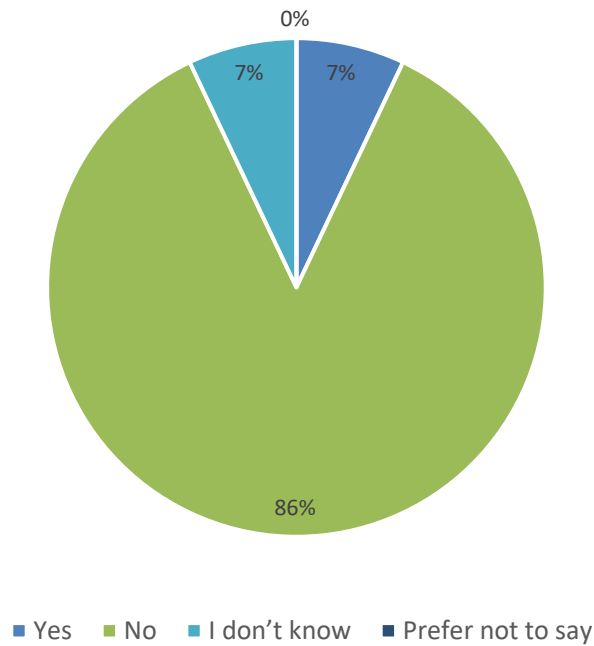
(b) What is the highest level of qualification you hold, or if you are a qualified accountant or lawyer, held prior to becoming qualified?



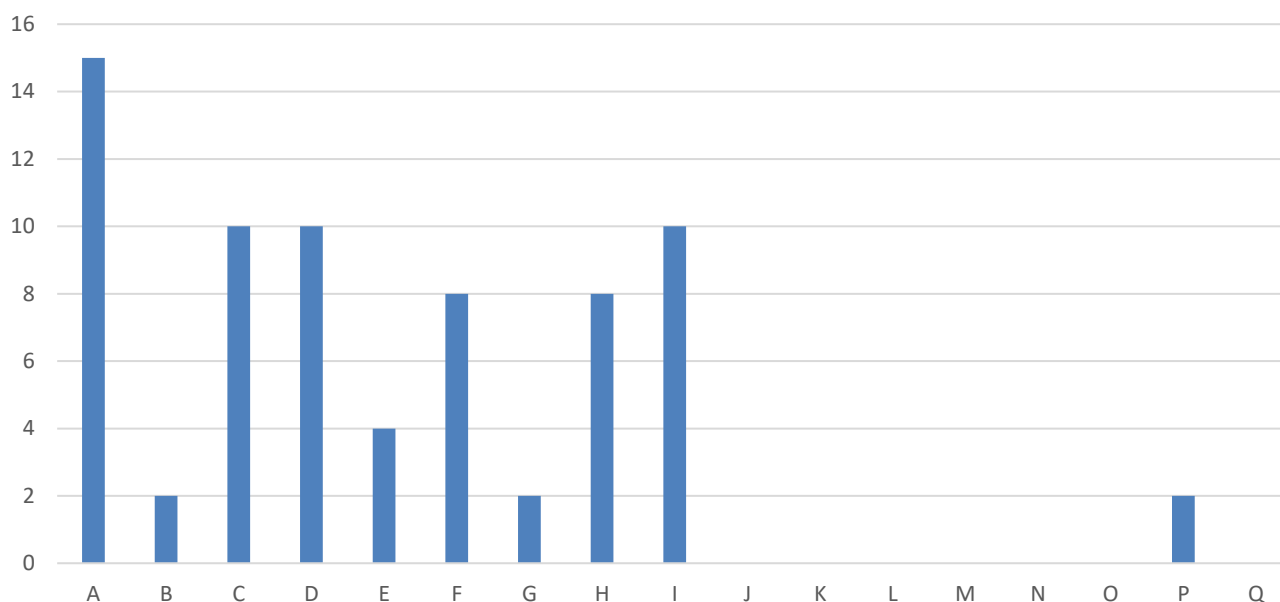
(c) Did either (or both) of the following apply at any point during your school years? i. Did your household receive income support?



(c) ii. Were you entitled to free school meals?



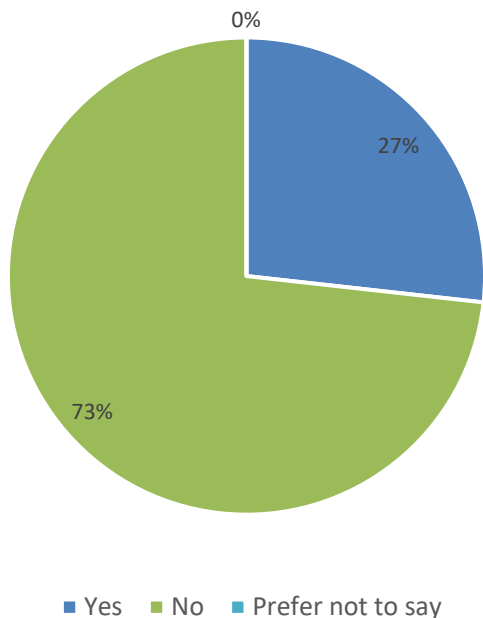
(d) Thinking back to when you were aged about 14, which best describes the sort of work the main / highest income earner in your household did in their main job?



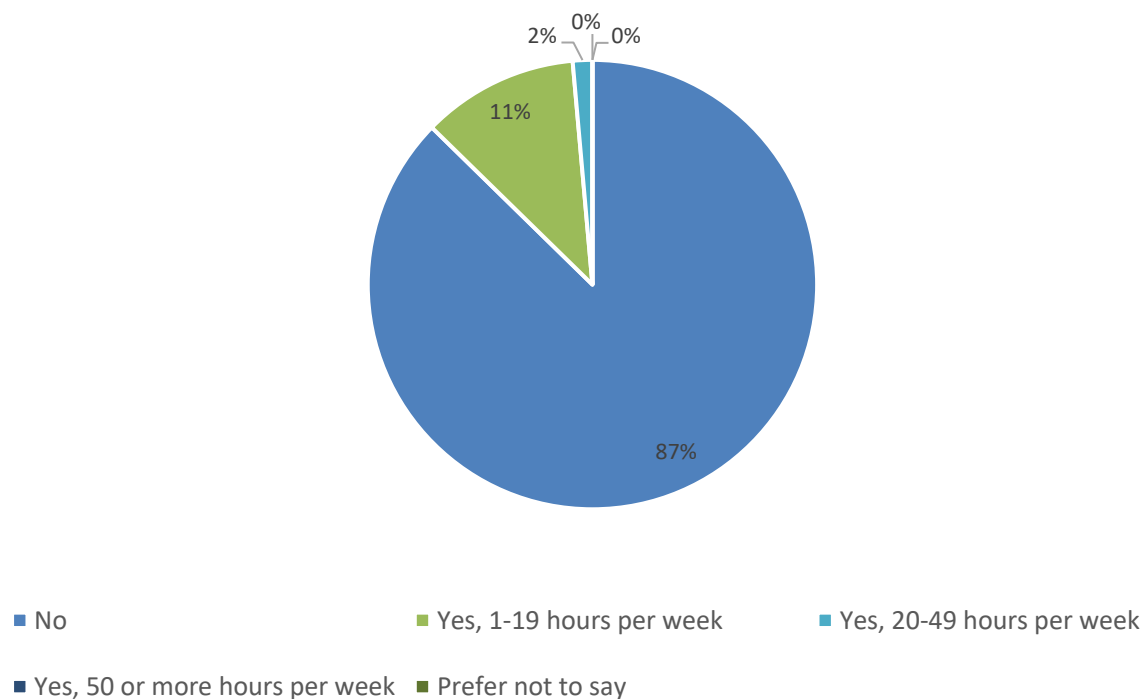
A	Modern professional occupations such as: teacher/lecturer, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above), software designer
B	Clerical and intermediate occupations such as: secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse
C	Senior managers and administrators usually responsible for planning, organising and co-ordinating work and for finance such as: finance manager, chief executive
D	Technical and craft occupations such as: motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener, train driver
E	Semi-routine manual and service occupations such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant
F	Routine manual and service occupations such as: HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter / waitress, bar staff
G	Armed forces personnel for example soldier, airman, naval or military police
H	Middle or junior managers such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican
I	Traditional professional occupations such as: accountant, solicitor, medical practitioner, scientist, civil/mechanical engineer
J	Short term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for a year or less)
K	Long term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year)
L	Inactive (excluding those that are retired)
M	Retired
N	Not applicable
O	I don't know
P	Other
Q	Prefer not to say

10. Caring Responsibilities

(a) Are you a primary carer for a child or children under 18?

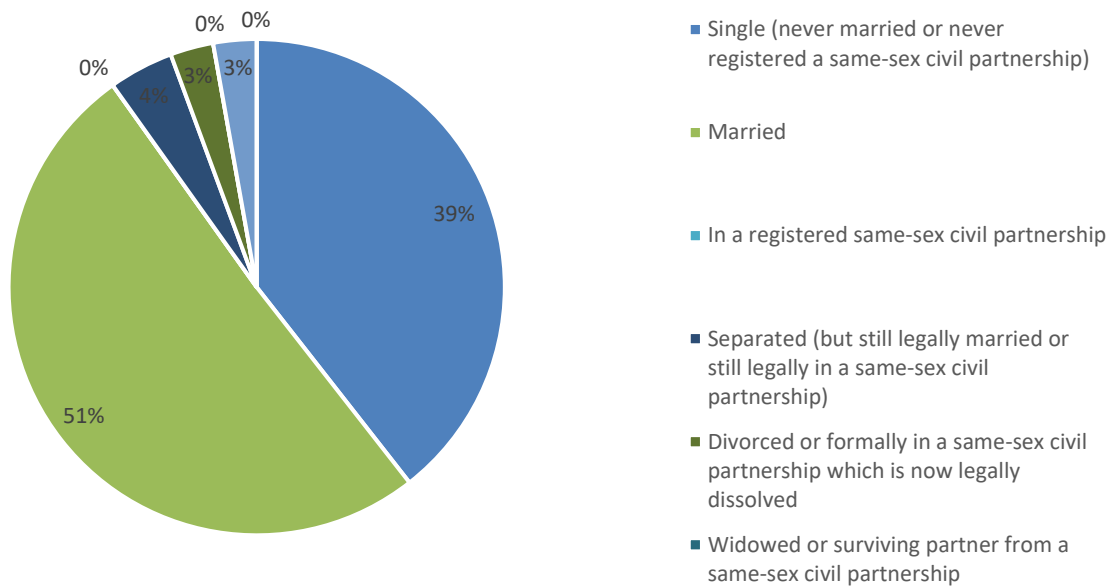


(b) Do you look after, or give any help or support to family members, friends, neighbours or others because of either: - Long term physical or mental ill-health / disability / Problems related to old-age?



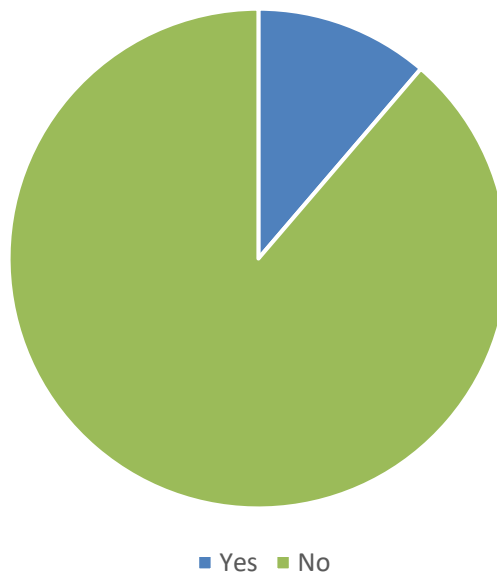
11. Marital Status

What is your marital or civil partnership status?

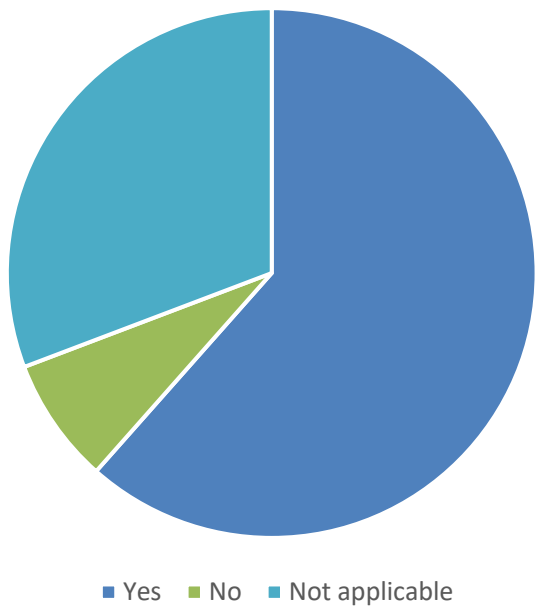


12. Maternity/ Paternity

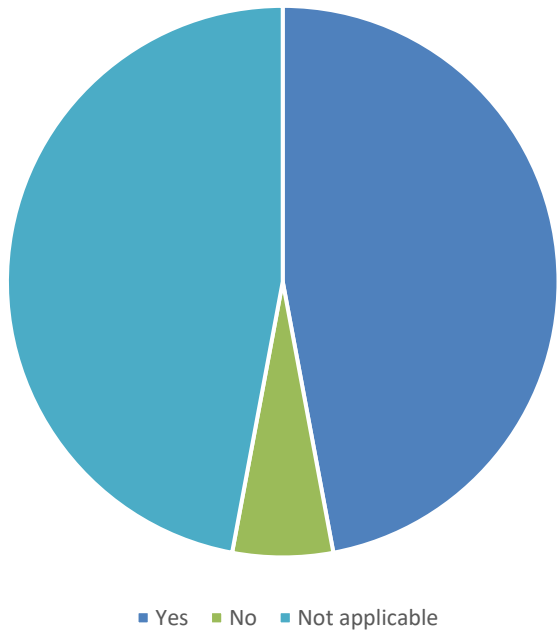
(a) Have you taken maternity or paternity leave in the last 5 years?



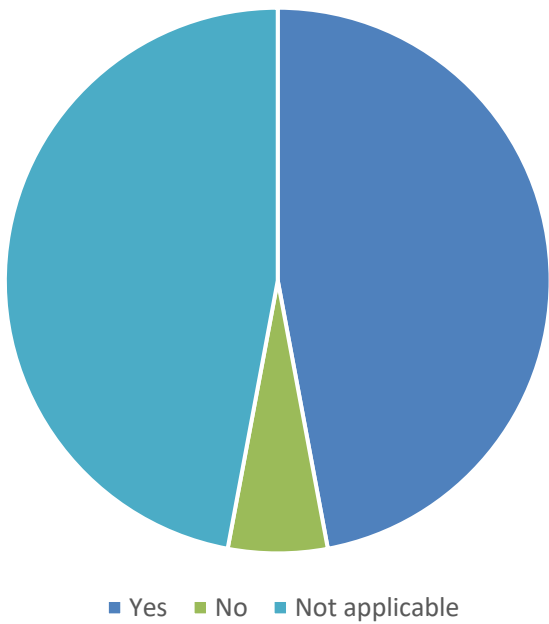
(b) If yes: i. Did you return to your current employer after the leave?



(b) If yes: ii. Did your current employer give you additional leave for ante-natal appointments?



(b) If yes: iii. Has your employer offered you flexible working arrangements?



(b) If yes: iv. Has the ability to work from home been an important aide in your return to work?

