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Francis Clark

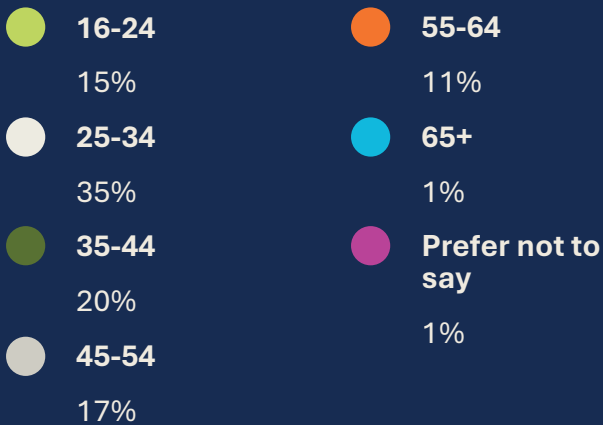
ICAEW probate diversity survey 2023

We aim to build an inclusive firm where we actively embrace diversity. In this environment, every person feels appreciated, is supported in their growth and can be their true selves.

We asked all partners and colleagues to complete the Institute of Chartered Accountants in England and Wales (ICAEW) Probate Diversity Survey anonymously. The survey is not mandatory and we had a 68.1% response rate. For this reason the figures shown are not a complete representation of the firm's diversity profile.

Key diversity survey statistics (as at March 2023):

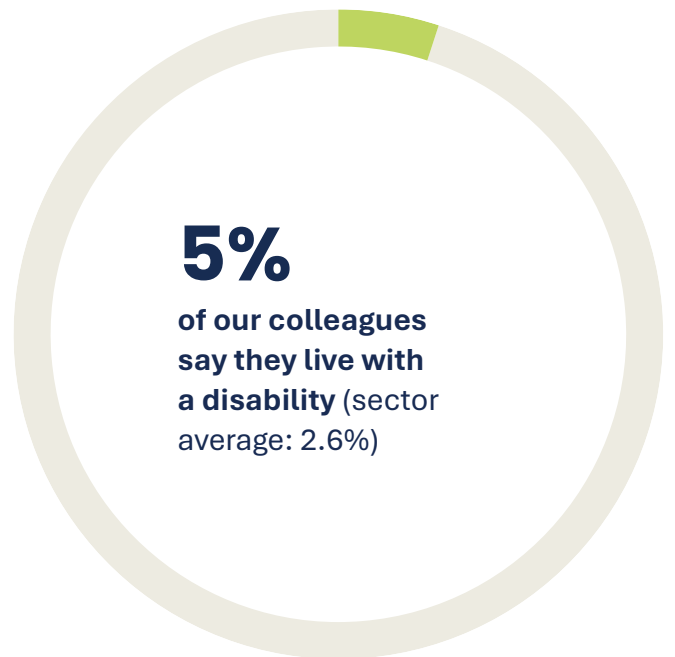
Our age profile ranges from 18 to 67



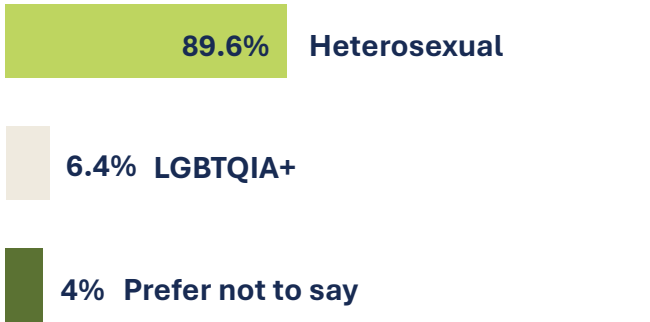
50% of our colleagues are younger than 35

12% are older than 55

Our workforce gender balance is **57% female, 42% male, 1% other/prefer not to say** (sector average: 55% female, 43% male, 2% other/prefer not to say*)

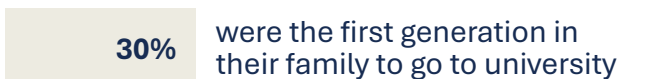
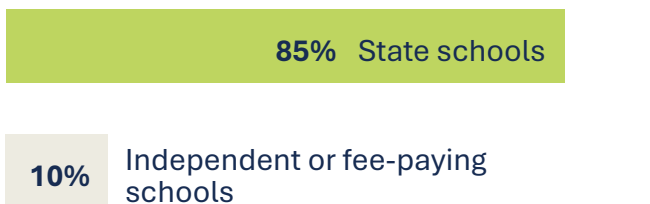


6.4% of our colleagues identify as LGBTQIA+ (sector average: 2.7%*). An additional 4% preferred not to say (sector average: 4.8%*)

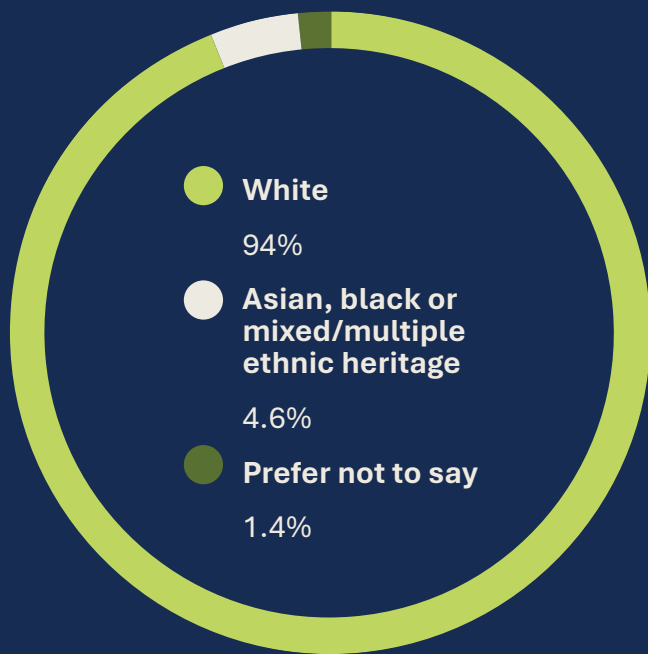


0.5% of our colleagues identify with a gender different to their sex registered at birth (while another 0.8% preferred not to say)

Our firm is made up of individuals from a broad range of socio-economic backgrounds, with 85% of partners and employees educated at state schools (sector average: 81.1%*), while 10% attended independent or fee-paying schools (sector average: 10.4%*)



94% of our colleagues identify as white, while 4.6% identify as being of Asian, black or mixed/multiple ethnic heritage (sector average: 10.6%*; 2021 census for South West England: 6.9%)



As the ICAEW has noted, improved diversity is a long-term process. Actions we are taking to increase the diversity of our teams include structured competency-based selection methods and training our managers on objective assessment for appraisals and career conversations. We also have a programme of educational outreach work to promote accountancy careers and attract candidates from a broad range of backgrounds.

**comparisons with ICAEW Probate Diversity Survey 2021 (2023 results not yet published at time of writing)*