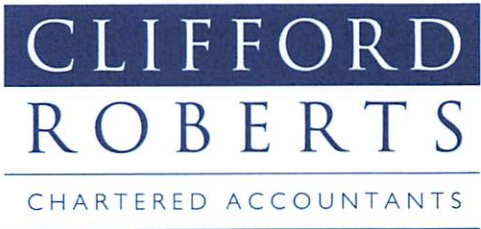


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**Clifford Roberts Chartered Accountants**  
**Probate Survey Diversity Survey**  
**31<sup>st</sup> March 2025**

Our ref: ICAEW:C008956443  
Date: 25<sup>th</sup> April 2025

As part of our Probate Licence, the ICAEW requires us to maintain a record of staff diversity and to publish the results of an annual survey on our website.

To not breach our staff’s confidentiality and in order to not compromise the anonymity of individual members of staff, we have published only the less sensitive data.

At the 31<sup>st</sup> March 2025, we had a total of 47 members of staff, including 6 partners, of which 44 people completed the ICAEW Diversity Survey, and the results are summarised as follows:

- All 6 partners are qualified Chartered Accountants and members of the ICAEW along with 3 other members of staff. 3 members of staff are training to become members.
- 10 members of staff are qualified accountants with other professional bodes and a further 7 are training to become members.
- 1 partner and 2 members of staff have specialist taxation or trust and estate qualifications.
- 5 members of staff have other professional accountancy qualifications with a further 3 currently working towards their qualifications.

• Ages: 

16-24	25-34	35-44	45-54	55-54	65+
5	12	8	7	7	1

 5 people would prefer not to say.

• Gender: 

Male	Female
22	19

 6 people would prefer not to say.

- A clear majority of all persons considered they had no disability with only 2% saying their day-to-day activities were limited a little because of health problems. 3 people would prefer not to say.
- 70% of staff are white British. 3 people would prefer not to say.

We also gathered other information including marital status, faith, sexual orientation, socio-economic backgrounds, and caring responsibilities.