

# TC Group 2021 Probate Diversity Report

Committed to equal opportunities  
and diversity

TC Group's Estate Planning and Probate service is provided by TC Tax and Legal Limited, which is licenced by the Institute of Chartered Accountants in England and Wales, to carry out the reserved legal activity of non-contentious probate in England and Wales.

The *2021 Probate Diversity Report* statistics (April 2021) comprised of individuals only employed by TC Tax and Legal Limited as the regulated entity and not the wider TC Group.

# 1. About You

## ICAEW Chartered Accountant

Partner 1      Manager 0      Qualified 0      Training 0

## Other Chartered Accountant

Partner 0      Manager 0      Qualified 0      Training 0

## Other Accountant

Partner 0      Manager 0      Qualified 0      Training 1

## Legally Qualified

Partner 2      Manager 0      Qualified 0      Training 3

## Other Legal

Partner 0      Manager 0      Qualified 0      Training 0

## Other Profession

Partner 2      Manager 1      Qualified 0      Training 0

## Direct Support Staff

Partner 0      Manager 0      Qualified 0      Training 0

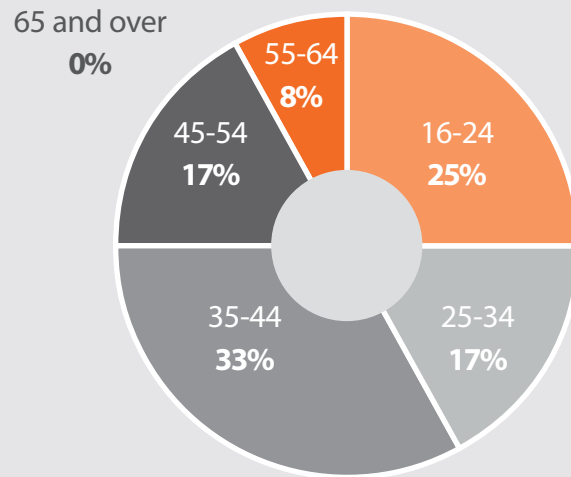
## Other

Partner 0      Manager 0      Qualified 0      Training 0

## Prefer Not to Say

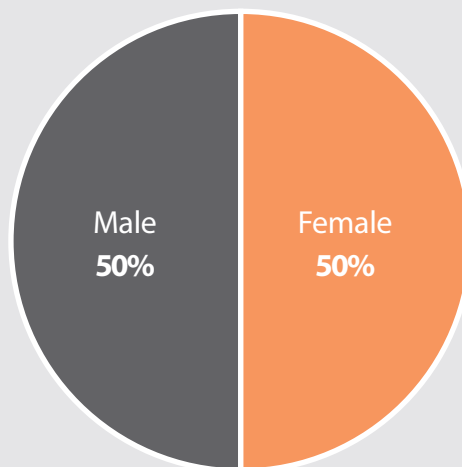
Not applicable 2

## 2. Age



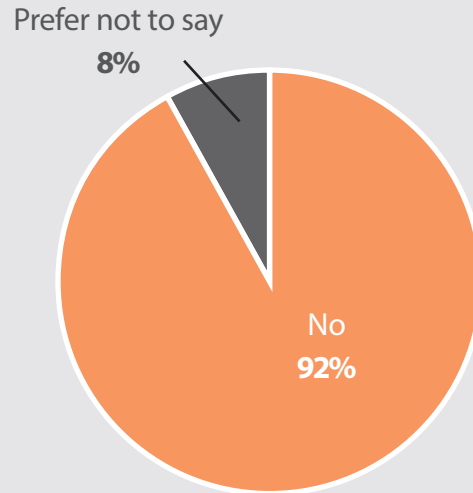
## 3. Sex / Gender

(a) Which gender do you identify with?

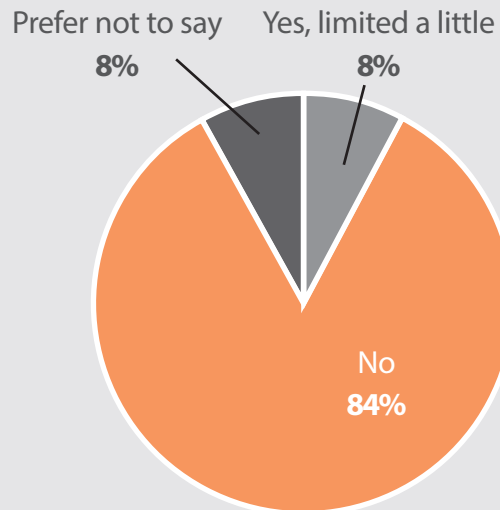


## 4. Disability

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



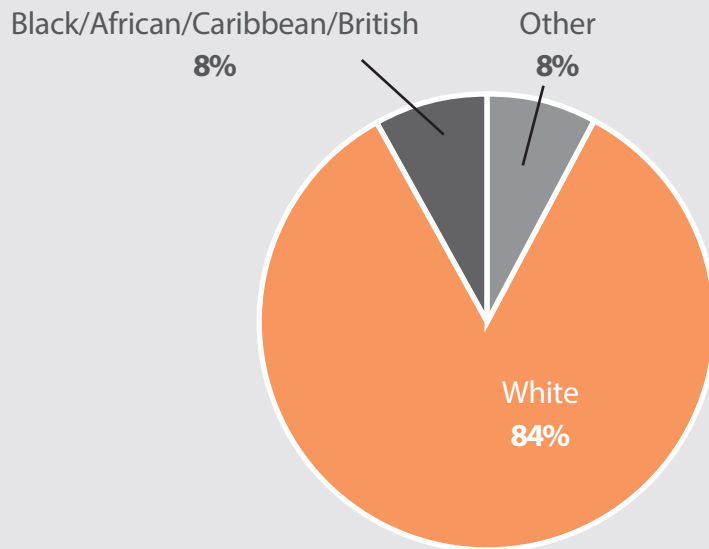
(b) Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?



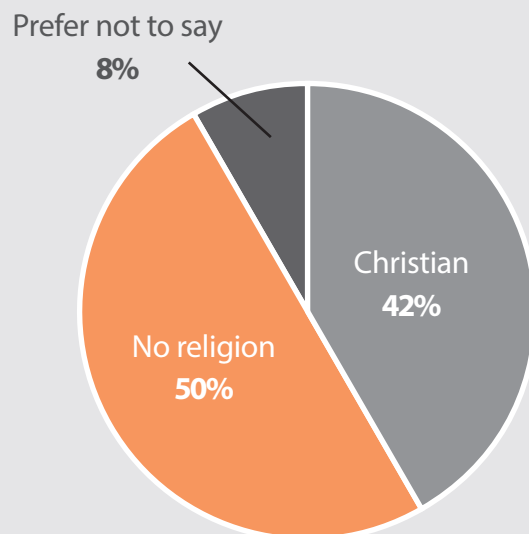
(c) If you have answered "Yes" to any of the previous two questions please identify which of the below health problems or disabilities apply?

Cognitive / learning	0	Physical strength	0
Digestive / continence	0	Sensory	0
Manual dexterity	0	Not applicable	0
Mental health	0	Other	0
Mobility	0	Prefer not to say	1
Physical coordination	0		

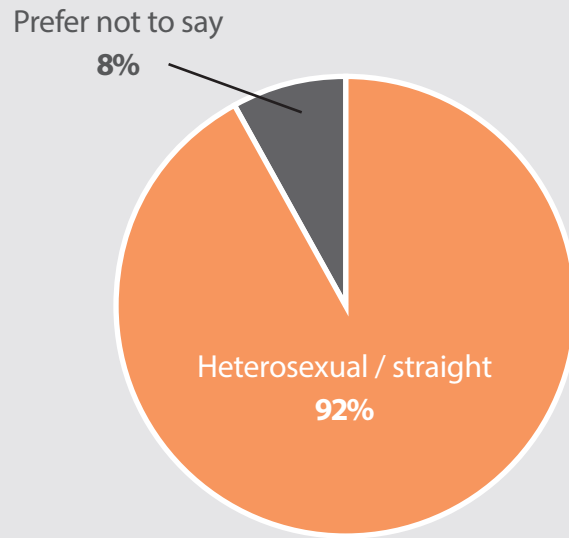
## 5. Ethnic Group



## 6. Faith



## 7. Sexual Orientation



## 8. Socio-economic Background

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

At least one has a degree level qualification	5	No formal qualifications	0
At least one has A Level or vocational qualifications	5	Not applicable	1
Qualifications below A Level / vocational	0	Other	0
I don't know	1	Prefer not to say	0

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

A state-run or state-funded school	8	Non-selective	0
Attended school outside of the British Isles	0	I don't know	0
Independent or fee-paying school	4	Prefer not to say	0
Selective on academic, faith or other grounds	0		

## 9. Social Mobility

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

Degree level	7	I don't know	0
A Level or vocational qualification	4	Not applicable	0
Qualifications below A Level	0	Other	0
No formal qualifications	0	Prefer not to say	1

(b) Did either (or both) of the following apply at any point during your school years?

**i.** Did your household received income support?

Yes	0	I don't know	2
No	9	Prefer not to say	1

(b)

**ii.** Were you entitled to free school meals?

Yes	1	I don't know	1
No	9	Prefer not to say	1

## 9. Social Mobility continued

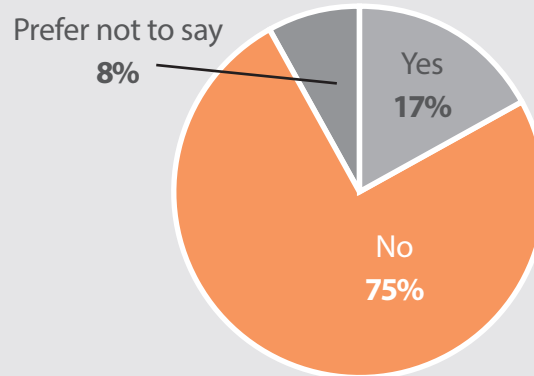
(c) Thinking back to when you were aged about 14, which best describes the sort of work the main / highest income earner in your household did in their main job?

Modern professional occupations such as: teacher/lecturer, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above), software designer	2
Clerical and intermediate occupations such as: secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse	0
Senior managers and administrators usually responsible for planning, organising and co-ordinating work and for finance such as: finance manager, chief executive	3
Technical and craft occupations such as: motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener, train driver	2
Semi-routine manual and service occupations such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant	0
Routine manual and service occupations such as: HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter / waitress, bar staff	0
Armed forces personnel for example soldier, airman, naval or military police	1
Middle or junior managers such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican	2
Traditional professional occupations such as: accountant, solicitor, medical practitioner, scientist, civil/mechanical engineer	1
Short term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for a year or less)	0
Long term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year)	0
Inactive (excluding those that are retired)	0
Retired	0
Not applicable	0
I don't know	0
Other	0
Prefer not to say	1

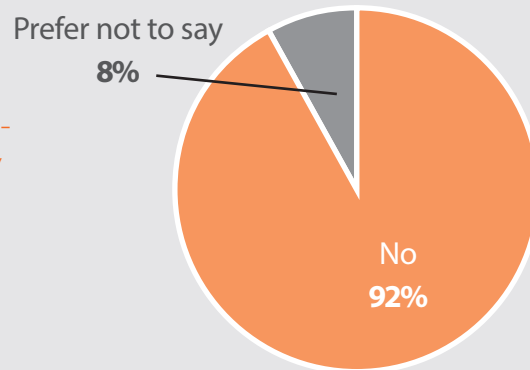


## 10. Caring Responsibilities

(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?

Single (never married or never registered a same-sex civil partnership)	5
Married	5
In a registered same-sex civil partnership	0
Separated (but still legally married or still legally in a same-sex civil partnership)	0
Divorced or formally in a same-sex civil partnership which is now legally dissolved	1
Widowed or surviving partner from a same-sex civil partnership	0
Other	0
Prefer not to say	1

## 12. Maternity / Paternity

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

Yes	0
No	12

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

Yes	0
No	1

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

Yes	0
No	0
Not applicable	0

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

Yes	0
No	0
Not applicable	0

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

Yes	0
No	0
Not applicable	0