

J.A.D. ASSOCIATES LIMITED

DIVERSITY SUMMARY AS AT 31 MARCH 2025

We are an equal opportunities employer respecting individuals and encouraging progression based on merit regardless of socioeconomic backgrounds. Where possible we promote part-time and flexible working patterns and remote working.

As required by the Institute of Chartered Accountants in England and Wales (ICAEW) and as part of the firm's accreditation to undertake non-contentious Probate Services, we are required to carry out regular diversity monitoring of our team and to publish the results.

Members of the team were requested to provide diversity data on a voluntary basis in accordance with ICAEW guidance and the results collated from the responses received are set out below.

Replies were received from all team members.

Our team comprises:

ICAEW Chartered Accountant Director	2
Other Chartered Accountant Director	1
Other Chartered Accountant Qualified	1
Other Training Accountant	3
Direct Support Staff Manager	2
Direct Support Staff Qualified	3
Direct Support Staff Training	1
Direct Support Staff Other	5
Prefer not to say	4

The age profile of the team is:

16-24	4
25-34	3
35-44	2
45-54	6
55-64	7

Our team identifies as:

Male	7
Female	15

All team members identify now with the sex they were assigned at birth.

One of our team 1 member considers themselves to have a disability according to the definition in the Equality Act. However, when asked if they considered their day-to-day activities to be limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months, the responses from all team members were:

Yes, limited a little	2
No	12
Prefer not to say	1
Not applicable	7

Of those team members that positively answered the questions regarding disability, they identified the health problems or disabilities to be associated as follows:

Mobility	1
Physical Strength	1
Sensory	1
Other	1
Prefer not to say	1

Most of our team are White British of English, Welsh, Northern Irish or Scottish extraction but our team also includes one Irish person and one African person. When asked about faith, our team identified themselves as follows:

Christian	7
No religion	13
Any other religion	1
Prefer not to say	1

With regards to Sexual Orientation, most of our team regard themselves as Heterosexual/straight with one member of staff as a Gay man.

The majority of our team did not attend university, with 4 individuals considering themselves the first generation of their family to do so. 1 member of the team preferred not to say. Most of our team members attended a UK state school between the ages of 11 and 16. 8 of those individuals attended a school that was selective on academic, faith or other grounds, with 2 members preferring not to say.

Our team come from a variety of social mobility backgrounds. We asked them "What is the highest level of qualification achieved by either of your parents/guardians by the time you were 18?", and their replies were as follows:

2	had at least one parent/guardian who had a degree level qualification.
7	had at least one parent who had A level or vocational qualifications.
4	had at least one parent who had qualifications that were not vocational and were below A level.
3	had parents where neither had formal qualifications.
3	did not know what qualifications their parents had.
1	Answered not applicable
1	Preferred not to say

Our team were also asked "What is the highest level of qualification you hold, or if you are a qualified accountant or lawyer, held prior to becoming qualified, and their answers as follows:

Degree Level	5
A level or vocational qualification	10
Qualifications below A level	5
Prefer not to say	2

The majority of our team's household did not receive income support whilst they were of school age, with 5 members replying yes, 2 members did not know, and one member preferred not to say.

With regards to be entitled to free school meals whilst at school, our team answered as follows:

Yes	4
-----	---

No	15
I don't know	2
Prefer not to say	1

We also asked them to think back to when they were aged about 14 and to select from a list the option that best describes the sort of work the main/highest income earner in the household did in their main job. Their selections were as follows:

1 chose	Clerical and intermediate occupation such as: secretary, personal assistant, clerical worked, office clerk, call centre agent, nursing auxillary, nursery nurse
3 chose	Senior managers and administrators usually responsible for planning, organising and coordinating work and for finance, such as: finance manager, chief executive
5 chose	Technical and craft occupations such as: motor mechanic, fitter, inspector, plumber, printer, gardener, tool maker, electrician, train driver
1 chose	Semi-routine manual and service occupations such as: postal worker, machine operative, caretaker, security guard, farm worker, catering assistant, receptionist, sales assistant
4 chose	Routine manual and service occupations such as: HGV driver, van driver, cleaner, porter, messenger, packer, sewing machinist, labourer, waiter/waitress, bar staff.
1 chose	Middle or junior managers such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican.
3 chose	Traditional professional occupations such as: accountant, solicitor, medical practitioner, scientist, civil engineer, mechanical engineer.
1 chose	Long term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit.
1 chose	Inactive (excluding those that are retired)
1 chose	Other
2 chose	They preferred not to answer the questions

With regards to caring responsibilities, we asked our team if they 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 or problems related to old age. Their responses are as follows:

19 chose	No
----------	----

1 chose	Yes, 1-19 hours per week
1 chose	Yes, 50 or more hours per week
1 chose	Preferred not to say

We also asked them if there were a primary carer for a child or children under 18. The majority of our team (16) said they were not, 5 of the team do have a child or children, and 1 team member preferred not to say.

We asked our team of "what is your marital or civil partnership status?" They responded as below:

4 chose	Single (never married or never registered a same-sex civil partnership)
13 chose	Married
3 chose	Divorced or formerly in a same-sex civil partnership which is now legally dissolved
1 chose	Prefer not to say

3 team members have taken maternity or paternity leave in the last 5 years and all 3 returned to work for us following their leave. Prior to taking statutory leave, they were given additional leave to attend ante-natal appointments where necessary.

Those returning from maternity leave have the right to return to the job they were working prior to their leave. They also have the right to request flexible working. Where flexible working requests were received, they were considered and dealt with in accordance with employment legislation. Flexible working arrangements may now include an element of working from home, but this is assessed on a case-by-case basis.

Of those 3 team members who returned from maternity leave, 2 members felt that the ability to work from home was an important aid in their return to work.

4 members of our team consider themselves to be neurodivergent and have not shared this with us.