Stephenson Smart

Chartered Accountants and Business Advisors

On 31st March 2025, in accordance with our obligations under our ICAEW authorisation for the provisioning of Probate Services we carried out a Diversity Survey of our Partners and Staff.

The full results of this survey have been provided to the ICAEW for aggregation at an industry wide level. However, so that we comply with the Data Protection Act 2018 (UK GDPR) and do not breach workers' confidentiality or reveal anything which might enable someone to work out information about another person which was provided in confidence, we have aggregated some results across our entire firm and have only published less sensitive data.

The firm is committed to making reasonable adjustments for those with a disability in relation to their job role, job opportunities, promotion and training within the firm and the provision of services to clients.

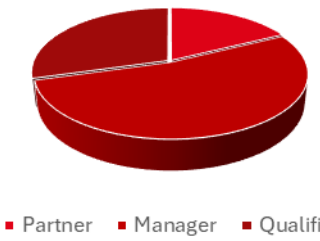
Recruitment decisions are made based on experience and qualifications. Factors such as where someone studied or their background do not influence the selection process for joining our team.

Decisions on promotions are considered on the work individuals carry out alongside their own personal aspirations. A fine-tuned appraisal and feedback process ensures all discussions and decisions are objective based on ability and experience.

Our employees are provided with full, fully funding training opportunities.

1. About you

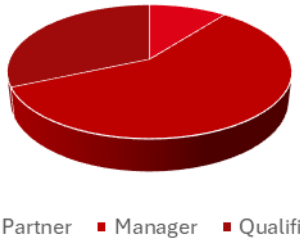
ICAEW Chartered Accountant



Legally Qualified



Other Chartered Accountant



Other Profession



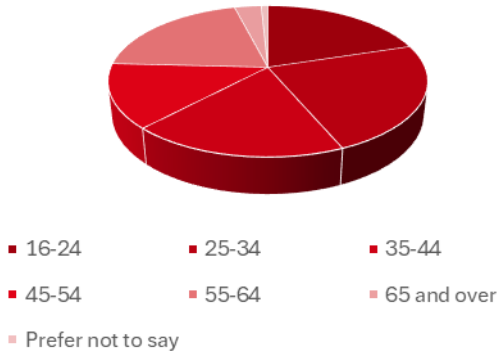
Other Accountant



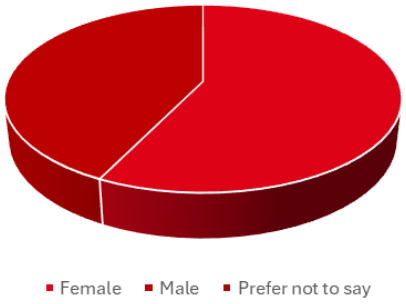
Direct Support Staff



2. Age

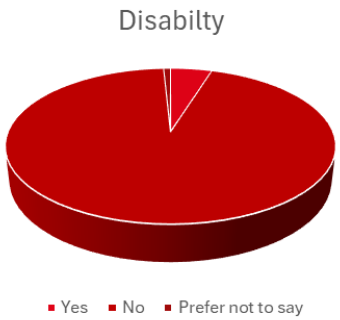


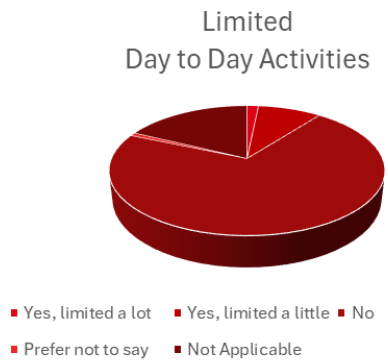
3. Sex and Gender



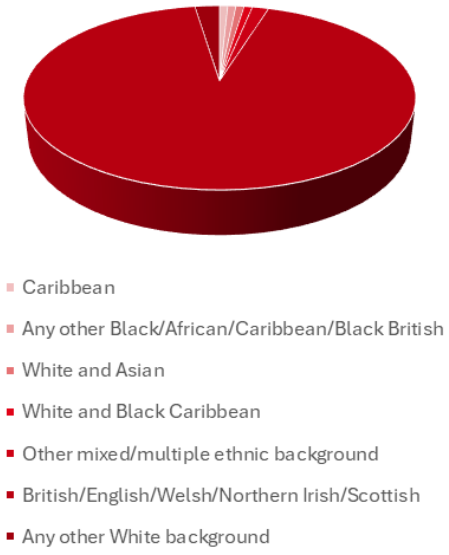
4. Disability

(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?

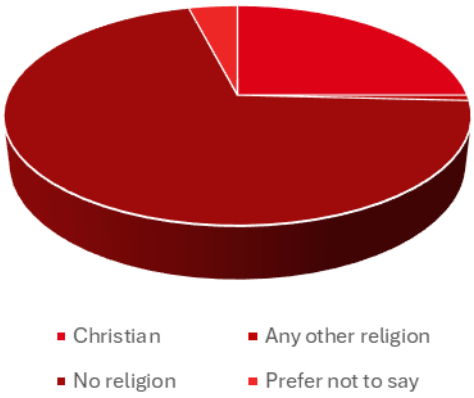




5. Ethnic Group



6. Faith

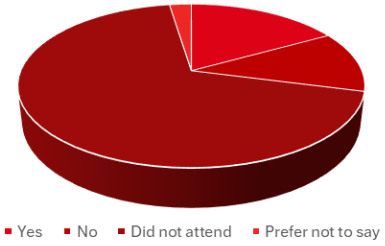


7. Sexual Orientation

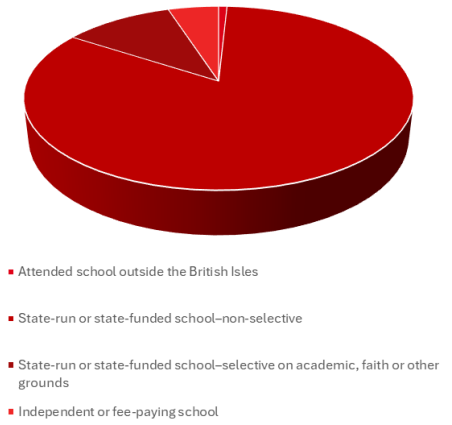


8. Socio-economic background

(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?

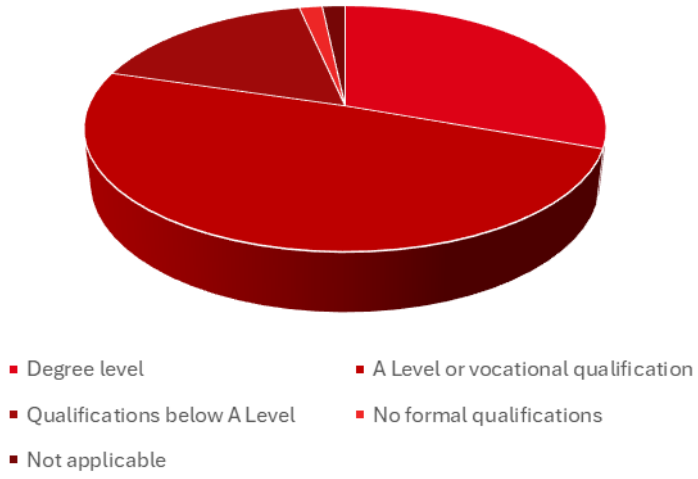


9. Social mobility

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



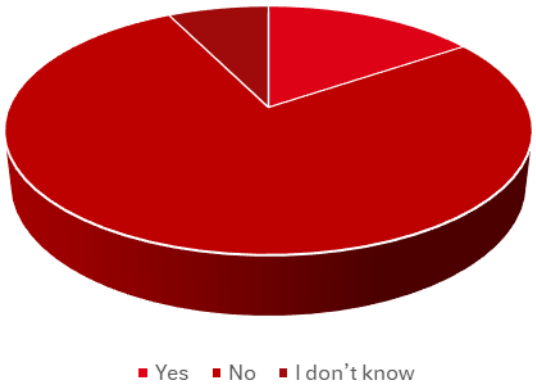
(b) What is the highest level of qualification you hold, or if you are a qualified accountant or lawyer, held prior to becoming qualified?



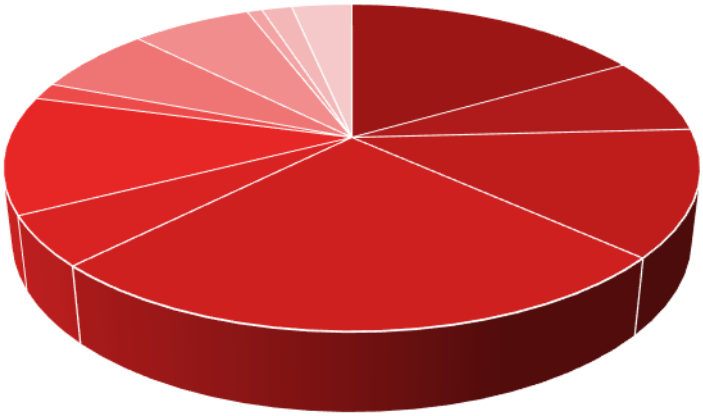
(c) i. Did your household receive income support?



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



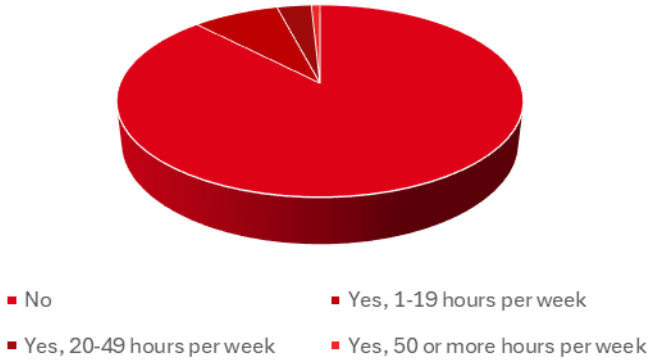
(c) Thinking back to when you were aged about 14, which best describes the sort of work the main / highest income earner in your household did in their main job?



- Modern professional occupations such as: teacher/lecturer, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above), software designer
- Clerical and intermediate occupations such as: secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse
- Senior managers and administrators usually responsible for planning, organising and co-ordinating work and for finance such as: finance manager, chief executive
- Technical and craft occupations such as: motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener, train driver
- Semi-routine manual and service occupations such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant
- Routine manual and service occupations such as: HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter / waitress, bar staff
- Armed forces personnel for example soldier, airman, naval or military police
- Middle or junior managers such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican

10. Caring responsibilities

(a) 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 or Problems related to old-age?



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



11. Marital Status

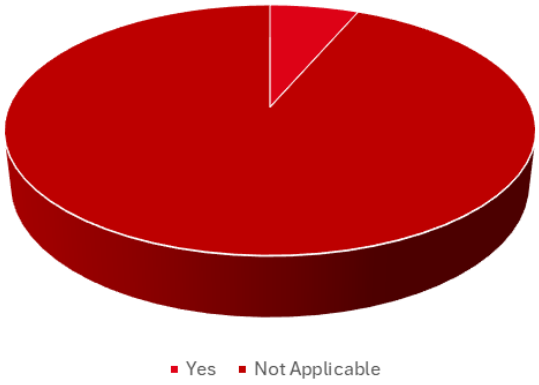


12. Maternity

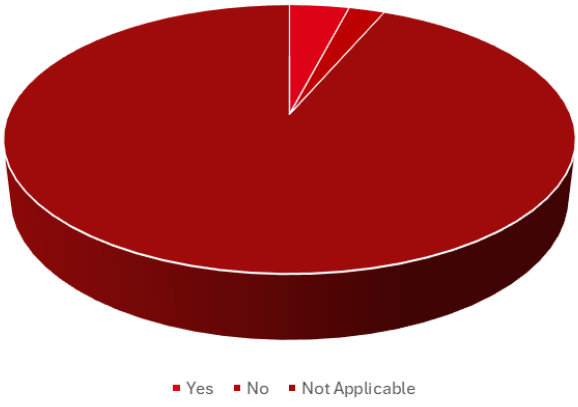
(a) Have you taken maternity or paternity leave in the last 5 years?



(b) If yes: Did you return to the same employer after the leave?



(c) If yes: Did your employer allow you to take time off with full pay for ante-natal appointments?



13. Neurodiversity

(a) Do you consider yourself to be neurodivergent?



(b) If yes: Have you shared information about your neurodivergence with your employer?

