

Diversity Monitoring Summary

Employee Qualifications	Partner	Manager	Qualified	Training	Total
ICAEW Chartered Accountant	2	1	1	0	4
Other Chartered Accountant	0	0	0	0	0
Other accountant	1	0	0	0	1
Legally qualified	0	1	0	0	1
Other legal	0	0	0	0	0
Other profession	1	0	1	0	2
Direct support staff	0	0	0	0	0
Other	0	0	0	0	0
Prefer not to say	0	0	0	0	0
Age	16-24	25-34	35-44	45-54	55-64
	0	1	1	3	1
	65+	Prefer not to say			
	0	0			
Sex/Gender	Female	Male	Prefer not to say	Some other way	Prefer not to say
What is your Registered sex at birth?	3	2	1		
Which gender do you identify with?	Woman	Man	Non-binary	Some other way	Prefer not to say
	3	2	0	0	1
Is the gender you identify with the same as your sex registered at birth?	Yes	No	Prefer not to say		
	5	0	1		
Disability	Yes	No	Prefer not to say	Prefer not to say	Prefer not to say
Do you consider yourself to have a disability according to the definition in the Equality Act?	0	6	0		
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?	Yes, limited a lot	Yes, limited a little	No	Prefer not to say	
	0	0	6	0	

Diversity Monitoring Summary

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	Digestive / continence	Manual dexterity	Mental health	Mobility
	0	0	0	0	0
	Physical coordination	Physical strength	Sensory	Not applicable	Other
	0	0	0	0	0
	Prefer not to say				
	0				
Ethnic Group					
Asian/Asian British	Bangladeshi	Chinese	Indian	Pakistani	Other Asian
	0	0	0	0	0
Black/African/Caribbean/British	African	Caribbean	Any other		
	0	0	0		
Mixed/multiple ethnic groups	White & Asian	White & Black African	White & Black Caribbean	Any other	
	0	0	0	0	
White	British	Irish	Gypsy or Irish traveller	Any other	
	5	0	0	0	
Arab	Arab				
	0				
Other	Other ethnic group	Prefer not to say			
	0	1			
Socio-economic background					
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?	Yes	No	Did not attend	Prefer not to say	
	2	2	1	1	

Diversity Monitoring Summary

What type of school did you mainly attend between the ages of 11 and 16?	Attended school outside the British Isles	State-run or state-funded school–non-selective	State-run or state-funded school–selective on academic, faith or other grounds	Independent or fee-paying school	I don't know
	0	3	1	1	0
	Prefer not to say				
	1				
Social mobility					
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	At least one has A Level or vocational qualifications	Qualifications below A Level / vocational	No formal qualifications	I don't know
	1	2	1	0	1
	Not applicable	Other	Prefer not to say		
	0	0	1		
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	A Level or vocational qualification	Qualifications below A Level	No formal qualifications	I don't know
	5	0	0	0	0
	Not applicable	Other	Prefer not to say		
	0	0	1		
Did either (or both) of the following apply at any point during your school years? Did your household received income support?	Yes	No	I don't know	Prefer not to say	
	0	5	0	1	

Were you entitled to free school meals?	Yes	No	I don't know	Prefer not to say	
	0	5	0	1	
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	Clerical and intermediate occupations	Senior managers and administrators usually responsible for planning, organising and co-ordinating work and for finance	Technical and craft occupations	Semi-routine manual and service occupations
	2	0	1	0	0
	Routine manual and service occupations	Middle or junior managers	Traditional professional occupations	Short term unemployed	Long term unemployed
	0	0	1	1	0
	Inactive	Retired	Not applicable	I don't know	Other
	0	0	0	0	0
	Prefer not to say				
	1				

Note: Information correct as at March 2023

Magma Trust & Estates Limited

During March 2023 we carried out our most recent diversity survey, with respondents being the principals and ICAEW authorised individuals of Magma Trusts & Estates Limited. Magma Trusts & Estates Limited is part of a wider group of companies that make up the Magma Chartered Accountants group which employs in the region of 100 people and has a very diverse workforce. Diversity and inclusion is very important to our firm and this helps us recruit and retain high quality people for our flexible and responsive workforce.