

Our diversity and inclusion snapshot 2023



We are committed to cultivating and preserving a culture of diversity, equity and inclusion (DEI). Our people are our most valuable asset. We bring our life experiences, knowledge, creativity, and talents together at Mercer & Hole making it a unique place to work where all can safely thrive.

Our DEI strategy has gone from strength to strength over the past two years. Our educational programme during that time set our clear intention for inclusivity. We now have an active DEI Working Party which enjoys celebrating different calendar DEI events.

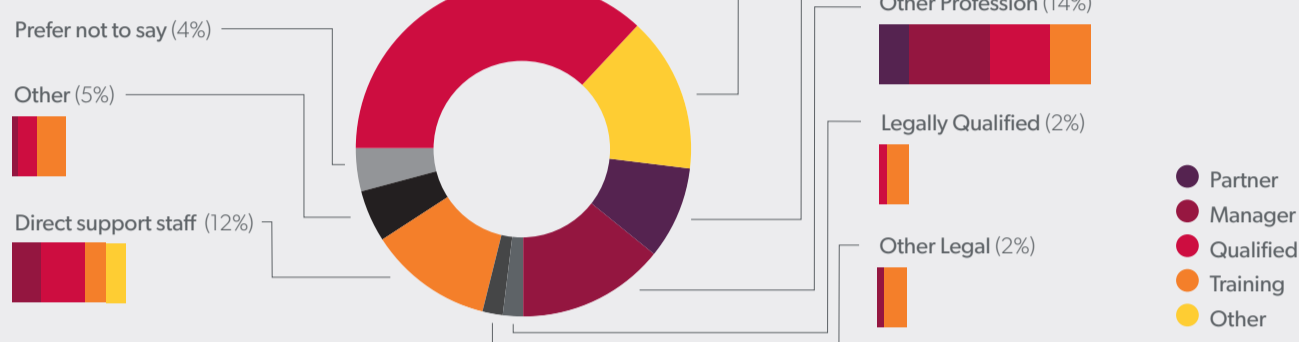
Overall response to the survey

We are delighted that our strategic DEI efforts have started to be reflected in our figures. Although the Probate License is registered under Mercer & Hole Trustees Limited, we extended the survey to all employees of Mercer & Hole and applied the same principles to maximise our understanding of the diverse make-up of the firm.

Who we are

Our shared values of TRUST across the firm (Together, Resilience, Understanding, Supportive and Thrive) strengthen our cultural connections between us all, regardless of our different roles and backgrounds.

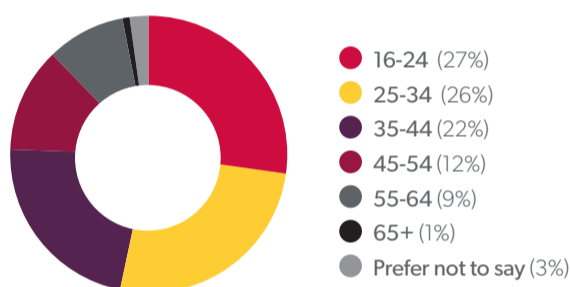
Having a strong firm identity has enabled us to understand and support one another to work successfully in an agile way so as to continue to make that meaningful difference to our clients. The average tenure of employees with us is six years.



Age

We know that around 70% of our firm are Millennials (those aged 42-28) or younger – with Generation Z (those below 27) only being just behind Millennials in terms of headcount. This has been captured in our data here too. We have a culture where people are humble and confident and know how to have fun.

We are committed to developing our employees across four quadrants – their qualifications, their departmental development, their business skills development and also in where our employees' interests lie in making a wider contribution to the firm. We call this commitment across the four quadrants our 'People Passport'.



Sex/Gender



Which gender do you identify with?

Our almost even split continues to run throughout the firm at all levels, but we do not get complacent with this, monitoring our gender pay and recruitment pools. Not all employees have wanted to complete parts of this section.

- A woman (44%)
- A man (54%)
- Prefer not to say (2%)

Faith

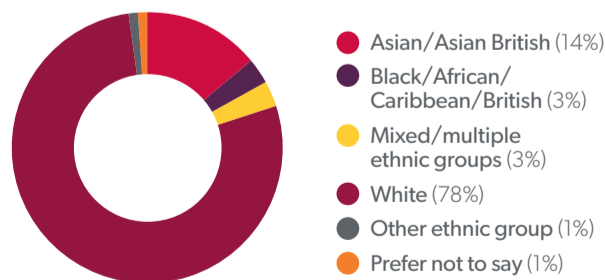


Our employees hold a range of faiths, and we are committed to learning about and supporting them together. Our DEI Working Party is leading this initiative and we celebrate religious events such as Ramadan across our four offices.

- Christian
- Muslim
- Jewish
- Hindu
- Sikh
- Any other religion
- No religion
- Prefer not to say

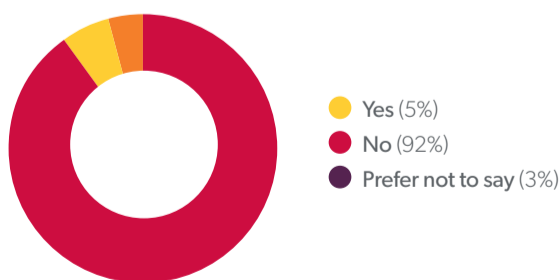
Ethnicity

Employees from an ethnic minority background have risen by 10% since 2021's ICAEW probate survey results and we recently took part in Race Equality Week UK.



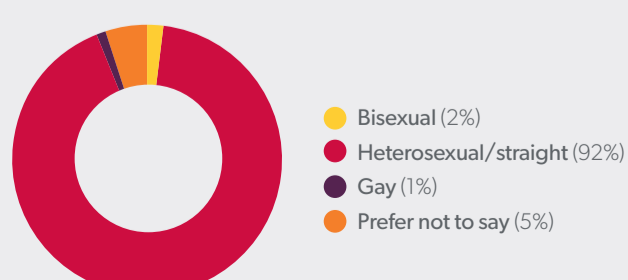
Disability

We support all employees when they face any challenges with their health and have dedicated Wellbeing Champions who receive mental health first aider training. We have an established Wellbeing infrastructure in the firm, from coffee mornings to Wellbeing Wanderers, to promote overall good health and wellbeing. The importance the firm places on this is supported by a good work life balance and integral Agile Working Policy.



Sexual orientation

Our employees predominantly identify as heterosexual, reflecting a broader trend across the accounting industry. We are working hard to raise awareness of the dynamics of sexual orientation, with a firm-wide webinar on the topic as well as organising events with our new DEI Working Party.



Caring responsibilities

In addition to our strong Agile Working Policy, we also have introduced a Flexi-Time Policy to allow employees to flex their hours around core hours of 10.00 – 16.30. In terms of other ways of supporting work life balance, 11% of the firm have taken maternity or paternity leave in the last 5 years.

