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2025

# MERCIA LEGAL SERVICES TRAINING PROVIDER REVIEW

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## OVERVIEW

This report outlines the findings from ICAEW's 2025 evaluation of [Mercia Group's Probate and Estate Administration training course](#). Our previous [review](#) took place in 2023 and this report also reflects on current performance compared to the previous review.

The review considers course delivery, accessibility, candidate performance, support services, complaints and feedback to ensure the course continues to meet the high standards required for ICAEW-accredited probate training.

## INTRODUCTION

Chartered Accountants seeking to become ICAEW-authorised individuals for probate must demonstrate they have the appropriate knowledge and competence to carry out non-contentious probate work. Mercia Group has been ICAEW's main provider of probate training since 2014. The course is designed to ensure candidates meet our required standards and are equipped to provide high quality probate services. Applicants who have successfully passed the assessment are awarded a Certificate in Probate and Estate Administration and are entitled to call themselves probate practitioners (practitioners).

To ensure the ongoing quality and effectiveness of this training pathway, ICAEW reviews Mercia's performance as a training provider every two years. This review assesses whether the course continues to meet its objectives, remains aligned with the probate curriculum, and is delivered in a way that supports candidates' learning and competence. The findings from ICAEW's most recent review are summarised in this report.

## CURRICULUM AND COURSE FORMAT

Mercia offers an "on demand" online course and a Mercia "live" course. The Mercia live course is livestreamed and consists of four half-day sessions on probate and estate administration and an assessment. The programme is delivered twice yearly in four half-day morning sessions. It is recorded and made available in alternative formats for up to 12 months post-course. Candidates can also purchase access to recordings and course notes independently of scheduled sessions.

There have been no material changes to content or structure beyond minor enhancements and Mercia has confirmed that no major legal or regulatory developments in non-contentious probate justified a change in content. Course materials are clear and engaging. The webinar includes practical information for practitioners such as completing HM Court and Tribunal Service (HMCTS) forms and identifying issues that may potentially become contentious during engagements.

Mercia has observed that some candidates found aspects of the inheritance tax (IHT) course content challenging. In response, they have updated their website to recommend that prospective candidates have prior knowledge of IHT before enrolling. Mercia also offers a separate refresher course on IHT.

In 2025, Mercia will be introducing additional course material on the Administration of Oaths for new applicants to reflect the proposed introduction of these services for ICAEW legal services accredited firms from autumn 2025. ICAEW is also working with Mercia to develop separate resources on Oaths for current practitioners who wish to start delivering these services.

In comparison to our last review, where four live courses and exams were offered, course frequency in 2023 and 2024 was reduced to two live events due to lower attendance. Two courses and three assessment dates (to allow for re-takes) are planned for 2025.

## COURSE ATTENDANCE AND PARTICIPATION TRENDS

### Comparison of attendance

Year	Livestreamed	On-demand	Assessment
2022	43	31	68
2023	25	54	78
2024	41	35	76

The total number of candidates attending or accessing training materials in 2023 and 2024 exceeded 2022 levels. This suggests continued interest in the programme, despite fewer live events. The on-demand format appears to be popular and offers flexibility.

It was not clear how many participants attended the course to refresh knowledge rather than achieve accreditation, however, notably, 34 candidates in 2023 and 2024 paid for course access but did not attend the assessment. There were 30 candidates out of the 34 who did not sit the assessment booked to view the recording of the livestream. This group therefore may include those studying for general knowledge or deferring assessments.

## ASSESSMENT PERFORMANCE AND INTEGRITY

### Examination results (2019–2024)

Year	Total exam attempts	Passes	Fails	Pass rate
2019	141	119	22	84%
2020	103	90	13	87%
2021	103	88	15	85%
2022	68	47	21	69%
2023	78	51	27	65%
2024	76	50	26	69%

Assessment performance in 2023 and 2024 mirrors the 2022 dip from earlier years (2019 - 2021 average pass rate of 85%). There is a stable but lower pass rate (65–69%) which has now persisted for three consecutive years. Mercia attributes part of this trend to an increase in under-prepared candidates joining the course without adequate IHT knowledge. To mitigate this, Mercia has revised its website to better communicate required entry knowledge and offers post-failure support and feedback.

### Re-sit trends (2019–2024)

Year	First attempt	Re-sits	Total
2019	132	6	9
2020	91	7	12
2021	92	8	11
2022	55	6	13
2023	78	68	10
2024	76	64	12

Despite lower pass rates, the number of exam attempts has remained stable. A large number of re-sitters eventually passed in 2023, 2024 and early 2025. Four did not rebook.

As part of this review, Mercia also evaluated candidate outcomes and found no significant difference in performance between those who attended live courses and those who accessed the recorded sessions.

Exam integrity remains high. To maintain objectivity, course lecturers do not mark or compile the exams and the process appears well-managed. Mercia continues to use an external online testing company to invigilate exams. Mercia confirmed that no breaches were reported during the review period. Post-assessment feedback is also provided directly to unsuccessful candidates on request by a Technical Director.

## ACCESSIBILITY AND CANDIDATE SUPPORT

We are satisfied that Mercia continues to offer reasonable adjustments to candidates requiring additional support, such as additional time in exams. Mercia received five reported issues that required technical support such as internet issues and typing skills. Mercia confirmed that these issues were addressed promptly and did not affect assessment outcomes. The reported issues were technical, and unrelated to training quality or delivery.

## FEEDBACK AND COMPLAINTS HANDLING

Mercia received five formal complaints during the 2023–2024 period. These were all related to technical issues as described in the candidate support section. One additional issue involved a candidate discovering they were ineligible for accreditation on day one due to their employer's unqualified status and a refund was issued. We are satisfied that Mercia collects and acts on post-course feedback to support improvements where appropriate.

## ADDITIONAL SERVICES AND MATERIALS

In addition to delivering its core training course, Mercia also offers a range of optional supplementary resources to help practitioners stay up to date with developments in probate practice. Take-up of these services remains strong, with consistently high attendance at refresher courses and conferences, indicating their perceived value among the regulated community.

### Additional services attendance

- The [Probate and IHT – A Tax Refresher](#) course saw high attendance in 2023 and 2024, with on-demand participation increasing to 137 in 2024. The course attracts a broad audience including uncertificated Mercia members.
- In 2024, eighteen [Probate Compliance Reviews](#) were conducted, and twenty-one were completed in 2024.
- Attendance at Mercia's annual [Probate Practitioners Conference](#) remains high, with approximately 300 attendees across the 2023–2024 period.

## CONCLUSION

Mercia has maintained a stable and effective probate training programme throughout the review period, with no quality concerns identified. The flexible delivery model of both live and on-demand access in particular supports strong candidate engagement and the use of a professional testing provider upholds examination integrity. Outcomes remain satisfactory; however, we will continue to monitor trends in pass rates and candidate preparedness.