



WOMEN IN PERSONAL FINANCE SURVEY

WOMEN'S WEALTH ALLIANCE
WITH DATA PROVIDED BY
YUOGOV



Total responses



540

Have caring
responsibilities



51%

Employed, versus
self employed



71%

KEY FINDINGS AT A GLANCE

Based on women surveyed who are, or have previously worked in the
personal finance sector

Flexibility, opportunity to develop and work/life balance

88% of women surveyed reported that there is a great deal/ fair amount of job flexibility in their role and similarly, the majority (82%) think that they have a good work-life balance. 80% said there was a great deal /fair amount of opportunity to develop in their role.

What are the biggest barriers preventing more women from entering the personal finance sector?

84% of women surveyed said it being a male dominated sector, 49% said that there is a lack of education/knowledge of the sector amongst women and 47% said women not thinking a career in finance is for them.

93% of women surveyed who are currently or have previously been in the financial planning role would recommend this role to other women but over half who have not worked in this role say they would not consider it in their future career (56%).

86%

FEEL/FELT SUPPORTED
BY COLLEAGUES

79%

FEEL/FELT SUPPORTED
BY FIRM

74%

FEEL/FELT SUPPORTED
BY MANAGER

WHAT WOULD ENCOURAGE MORE WOMEN INTO SECTOR?

“More representation of women at senior levels in firms being role models for future generations”

“For personal finance to be added into the school curriculum.”

“Get rid of the stereotype that this is an ageing male industry, make it more appealing to females and younger candidates”

“Education to highlight all the careers available within personal finance, especially the less well known ones (eg compliance, paraplanning etc)”

From open-ended responses within the survey



Thank you to our sponsors



If you would like to discuss our findings or would be interested to work with us, please don't hesitate to reach out to us.

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Fieldwork for this survey took place between 2nd - 23rd June 2025. YouGov provided the Women's Wealth Alliance with open links to distribute to women in the personal finance sector.

The data is based on 540 responses from women who currently or previously worked across financial planning, mortgage and protection advice, financial coaching, academy members and apprentice, paraplanning, compliance, T&C and support roles. 338 were financial planners. Analysis was conducted by the Women's Wealth Alliance.