



PRIVACY NOTICE

Protecting your privacy is important to us. We strive to do business in a manner that justifies you choosing Block Advisors®. We are providing you this privacy notice as required by law. This privacy notice explains the types of information we may collect from and about you or your business, how we may use or disclose that information, your rights with respect to your information, and how we protect that information.

Who This Privacy Notice Covers

This notice applies to personal and business information we collect when we provide tax preparation and other products and services to customers and former customers of Block Advisors®. Products and services are offered by HRB Tax Group, Inc. and its subsidiaries. This notice does not apply to HRB Tax Group's affiliates or franchisees or Pathward, National Association, an FDIC insured member institution. These companies may be subject to different regulations and may have different operating practices. If you are doing business with these companies, you should consult their respective privacy notices.

Categories of Information We May Collect

We collect various information about you, your spouse, your dependents, your business, and other individuals (e.g., employees as part of providing business services) in order to provide services to you. This information may include:

- **Contact Information** (e.g., name and email address);
- **Dates of Birth**;
- **Social Security Numbers** and other government identification numbers (e.g., EIN and ITIN);
- **Financial Information** (e.g., income, revenue, assets, credits, deductions, and expenses);
- **Payment Data** (e.g., checking, debit and credit account numbers and balances and payment history);
- **Payroll Information** (related to business services);
- **Log-In Information** (only if you choose to provide); and
- **Demographic Information.**

We collect this information from the following categories and sources:

- Information you voluntarily provide, for example when you request services or information from us, enter contests or sweepstakes, or complete surveys or polls. If you choose not to provide certain information we request, we may be unable to serve you as our products, services, tools, or calculators may rely upon this information.
- Information related to transactions that you complete or propose to complete with us, our affiliates, our franchisees, or certain non-affiliated third parties.
- Information from others, such as our affiliates, our franchisees, or business partners, the Internal Revenue Service (IRS), other government entities, and certain non-affiliated parties (e.g., credit reporting agencies).

How We May Use or Disclose Information about You

Our use and disclosure of your information is controlled by various laws, regulations, and other legal requirements, as well as our internal policies. We may use or disclose information that we collect, subject to the terms of this privacy notice and consistent with applicable law. The examples contained in this notice are illustrations; they are not intended to be exclusive.

- Where permitted or required by law, we may use or disclose your information for our normal business purposes such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus. This may include assigning you a unique identifier or disclosures to the IRS.
- We may disclose your information to service providers who perform business functions on our behalf (including service providers who perform "auxiliary services" in connection with tax return preparation, as permitted by IRC Section 7216, and service providers who help deliver advertising tailored to your interests). With your consent or

where otherwise permitted by law, we may also disclose your information to joint marketers and business partners (including other financial companies) with whom we have joint marketing agreements. We require all service providers (including marketing service providers) to have written contracts with us that require them to safeguard your information and prohibit them from selling, retaining, using or disclosing your information for any purpose other than for the specific purpose of performing the contract.

- As permitted by law, we may use, or disclose your information to our affiliates for their everyday business purposes, such as to support the products and services you request or offer you additional products or services. This may include delivery of newsletters and publications. In certain situations involving information collected for tax return preparation, we may be required to have your consent before we disclose this information.
- We do not sell or rent your information. We retain your information in accordance with our document retention policies, applicable laws, and as needed.
- We may disclose your information (individually or in aggregate form) to other H&R Block companies or non-affiliated parties (including government entities) when we have a good faith belief that such disclosure is required or permitted by law. This may occur, for example, in connection with a court order, legal process, or other judicial, administrative or investigative proceeding. This may occur in other situations as part of our business operations (including disclosure to H&R Block franchisees or as part of the sale of our business).

How We Protect Your Information

We maintain physical, electronic, and administrative policies and procedures designed to restrict access to your information. These include programs and specifications for physical security and records retention and disposal; computer and communication security measures reflected in system design, password protection and data management practices; and other measures to restrict access to the data we hold in physical and electronic forms. In the event of a data security incident, we will notify you as permitted by law which may include by email, mail, or telephone.

How to Limit Direct Marketing Contact and Sharing of Your Information

As permitted by law, we may share your information with our affiliates and non-affiliates to market their respective products and services to you. If at any time you wish to limit the offers or promotions you receive from us or our affiliates or our sharing your information with our affiliates or nonaffiliates, you may call 1-800-472-5625. We will use reasonable efforts to comply with your request. In these situations, it may still be necessary for us to send you information from time to time about transactions or accounts you have with us.

Changes to this Privacy Notice

We reserve the right to change this privacy notice and any of the policies described in this notice at any time, consistent with applicable law. If we make a material change to this notice, we will notify you by using one of the following methods: (1) we will post a notice on our web site describing the change; or (2) we will hand deliver or send you regular or electronic mail notifying you of the change.



PRIVACY NOTICE

ADDITIONAL INFORMATION FOR BUSINESS SERVICES CUSTOMERS IN CALIFORNIA

California law requires us to disclose the following additional information related to our privacy practices. If you are a California resident, the following privacy disclosures apply to you in addition to the rest of the privacy notice. Please note, the following information applies solely to business services customers visiting our retail offices. If you utilize our products and services online, please refer to our privacy notice available at blockadvisors.com for more information.

Collection and Disclosure of Personal Information

California law requires organizations to disclose whether certain categories of personal information are collected, disclosed for an organization’s “business purpose”, “sold” and/or “shared” for purposes of cross-context behavioral advertising (as those terms are defined under California law). We do not “sell” or “share” personal information covered by this privacy notice for purposes of cross-context behavioral advertising.

The following table describes the categories of personal information we may collect and the categories of recipients to whom we may disclose such information for our business purposes. Please note, in addition to the recipients identified below, we may also disclose any of the categories of personal information we collect to government entities, as may be needed to comply with law or prevent illegal activity, or professional services organizations, such as auditors and law firms.

Categories of Personal Information Collected	Categories of Recipients
Identifiers – such as name, postal address, email address, account name, or other similar identifiers.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Joint marketers ● Service providers
Additional categories of personal information described in the California Customer Records statute (Cal. Civ. Code § 1798.80(e)) – this may include signature, physical characteristics, or description, and insurance policy number.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Joint marketers ● Service providers
Government Issued Identification – such as social security number or other government identification number (e.g., EIN and TIN).	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Service providers
Financial Information – such as bank account number, credit card number, debit card number, and other financial information.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Service providers
Characteristics of protected classifications – such as age, sex, etc.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Service providers
Commercial information – such as information about products or services purchased, obtained, or considered, or other purchasing or consuming histories or tendencies.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Joint marketers ● Service providers
Audio, electronic, visual, thermal, olfactory, or similar information – such as call recordings or video surveillance.	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Service providers
Professional or employment-related information	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Service providers
Inferences drawn from any of the information listed above	<ul style="list-style-type: none"> ● Affiliates & subsidiaries ● Business partners ● Joint marketers ● Service providers

Some of the personal information we collect is considered “sensitive personal information” under California law. We may collect the following categories of sensitive personal information (as defined under California law): Social security, driver’s license, state identification card, or passport number; account log-in, financial account, debit card, or credit card

number in combination with any required security or access code, password, or credentials allowing access to an account, and union membership. This information is collected in order to process transactions, comply with laws, manage our business, or provide you with products and services. Note that we do not use such information for any purposes that are not identified within the California Privacy Rights Act Section 1798.121. We do not “sell” or “share” sensitive personal information for purposes of cross-context behavioral advertising.

Your Privacy Rights

If you are a California resident, you may have the following rights over your information:

- For the period covering the 12 months preceding your request, you may request that we disclose to you the categories and specific pieces of information collected about you, as well as certain information about our collection and use of your personal information.
- You may request that we delete personal information we collected from you, subject to certain exceptions.
- You may request that we correct inaccuracies in the personal information that we maintain about you.

In some cases, we may limit or deny your request because the law permits or requires us to do so, or if we are unable to adequately verify your identity. We will not discriminate against individuals who exercise their privacy rights under applicable law.

To exercise the rights described above, you may submit a request online at hrblock.com/dsar or call 1-800-472-5625. We will request personal information from you, including your name, address, email address, state of residency, phone number, last four digits of your Social Security number and your birth year, to verify your identity in order to process your request.

You may designate an authorized agent to submit requests to exercise certain privacy rights on your behalf. If you are an authorized agent submitting a request on behalf of an individual, you must attach a copy of a completed Authorized Agent Designation Form (available at hrblock.com/dsar) indicating that you are able to act on another person’s behalf.

How Long We Retain Your Information

We retain your personal information for only as long as necessary to fulfill the purposes outlined in this privacy notice, including for the purposes of satisfying any legal, accounting, or reporting requirements, unless a longer retention period is required or permitted by law.

If you need to access to this privacy notice in an alternative format due to having a disability, please contact us at 1-800-472-5625.