



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 Axos Bank™, 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. 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 the Internal Revenue Service (IRS), other government entities, and certain non-affiliated third parties (e.g., credit reporting agencies).
- Information we receive when you request services or information from us, our affiliates, our franchisees, or companies with whom we have a business relationship, enter contests or sweepstakes, or complete surveys or polls.

### 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. For example, this may include assigning you a unique identifier or disclosures to the IRS.
- With your consent or where otherwise permitted by law, 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). We require service providers have written contracts that specify appropriate use of your personal information, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use of your personal information.
- As permitted by law, we may use, or disclose to other H&R Block companies, your information to support the products and services you request (e.g., Tax Identity Shield®) 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 to third-party direct marketers.
- Where permitted by law, we may disclose your information to joint marketers and business partners with whom we have joint marketing agreements. We require all joint marketers to have written contracts with us that specify appropriate use of your information, require them to safeguard your information, and prohibit them from making unauthorized or unlawful use of your information.
- We may disclose your information (individually or in aggregate form) to other H&R Block companies or third 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).
- We retain your information in accordance with our document retention policies, applicable laws, and as needed.

### 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.

### How You May Control Use of Your Information

As described above, we or our affiliates may contact you about products and services. If at any time you wish to limit the offers or promotions you receive from us or our affiliates, you may call 1-877-723-5458. 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.

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.