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 MetaBank®, 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. 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 parties (e.g., credit reporting agencies).
- Information we receive when you request services or information from us, our affiliates, our franchisees, or business partners, 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 and conditions 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 send you regular or electronic mail notifying you of the change.

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.

California Residents
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, the categories of sources from which we collected that information, and the purposes for which your information was collected.
- You may also request that we delete information we collected from you.
- You have the right not to be discriminated against for exercising your rights over your information.

To exercise your rights, or if you have questions, you may submit a request online at hrblock.com/dsar or call a US-based representative at 1-800-472-5625. We will request personal information from you, such as your name, address, and last four digits of your Social Security number, to verify your identity in order to process your request.

How You May Control Use of Your Information
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 send you regular or electronic mail notifying you of the change.

Effective: January 1, 2022