



2022 ESG REPORT

**We care.  
We trust.  
We connect.**



**WE'RE MAKING EVERY BLOCK BETTER**



**We care.  
We trust.  
We connect.**

**At H&R Block, our Purpose is to provide help and inspire confidence in our clients and communities everywhere. With this Purpose, forming meaningful relationships is at the heart of everything we do — whether that's helping our clients, creating a Connected Culture for our associates, or connecting with the communities where we live and serve.**

“Personal relationships have always been important to H&R Block, and they continue to be priority one for our business.”



**Dear clients, partners, and shareholders,**

Connections — they are at the heart of everything we do at H&R Block. It takes human connections for us to deliver on our Purpose to provide help and inspire confidence in our clients and communities everywhere. Across the country, nearly 70,000 associates and franchisees work to deliver what sets us apart — the human expertise and care that we blend with technology and data to help people be better with money, whether that’s managing how they spend and save, get the best outcome at tax time, or manage the finances of their business. These human connections are what helped us make the strides outlined in this year’s Environmental, Social, and Governance (ESG) report covering fiscal year 2022 (July 1, 2021–June 30, 2022). Connections were core to how we lifted up communities and guided us in using resources wisely.

**A Connected Culture:** In a year filled with headlines about the Great Resignation, we remained committed to building a Connected Culture — one in which trust, care, and connections are how we work together as we continue to create an environment where everyone feels safe to bring their authentic self to work every day and feels like they belong as part of a larger

team. We steadfastly champion inclusion and belonging through our partnerships and programs that support diverse associates, minority business owners, and underrepresented communities.

**More Communities Connect:** We also deepened our commitment to supporting communities and creating an environment where neighbors can connect with each other and small businesses can thrive. We continued this work through our Make Every Block Better community impact platform with financial contributions, partnerships, and volunteer opportunities supporting communities nationwide. In the past year, I’m pleased to report that from coast-to-coast our work ensured the places many towns had forgotten were transformed into new, beautiful spaces where neighbors could convene. From community gardens to murals on community centers, we were proud to embark on our second year of making sure blocks were restored and more neighborhoods had places where they could come together to get to know each other better.

**Connecting with the Environment:** Finally, we continued to reduce our impact on the environment and are taking the next steps in reducing our

environmental footprint. This year we created our first enterprise-level environmental policy to help guide and unify our stewardship efforts. We also undertook our second carbon inventory, to better understand where our emissions are coming from and identify opportunities for reduction. We are taking meaningful steps in reducing our carbon footprint and will continue to investigate new methods for further reductions.

At H&R Block, being a responsible corporate citizen that connects with our people, communities, and planet has been a part of our culture and aspirations from the very beginning.

This is our third ESG report, but in many ways, we’re just getting started. There are many more connections to be built as together we create a bright future.



Jeffrey J. Jones II  
President and Chief Executive Officer

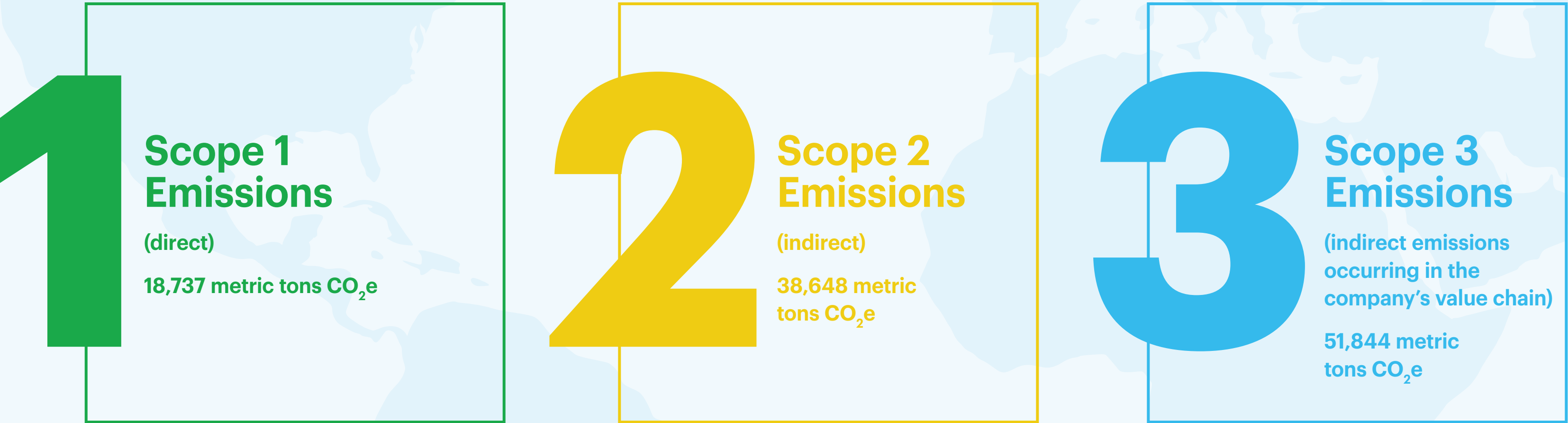


# Connecting with our Planet

Connecting with our clients, associates, and communities requires us to be responsible stewards of the environment. By better understanding and reducing the energy we consume, emissions we release, and waste we produce, we are positioning ourselves to conduct business in harmony with the environment.

# Measuring our Footprint

Government agencies, investors, and other stakeholders are increasingly recognizing the risks that climate change poses to society, the environment, and businesses. To better understand, accurately address, and meaningfully reduce our own climate impacts, we conducted a carbon accounting, estimation, and modeling project this year with our emissions, related to our U.S. operations, totaling approximately 109,000 metric tons of carbon dioxide equivalent. **This model includes estimated amounts of...**



## IT Equipment Recycling

Over the last year, H&R Block continued to donate technology devices to nonprofit partners across 33 states, keeping technology out of landfills while helping underrepresented families connect to the internet and important services.

## Software Packaging

Our software packaging contains materials that come from sources designed to support forest conservation, as certified by the Forest Stewardship Council. This certification guarantees that products or goods come from responsibly managed forests that equitably provide environmental, social, and economic benefits.

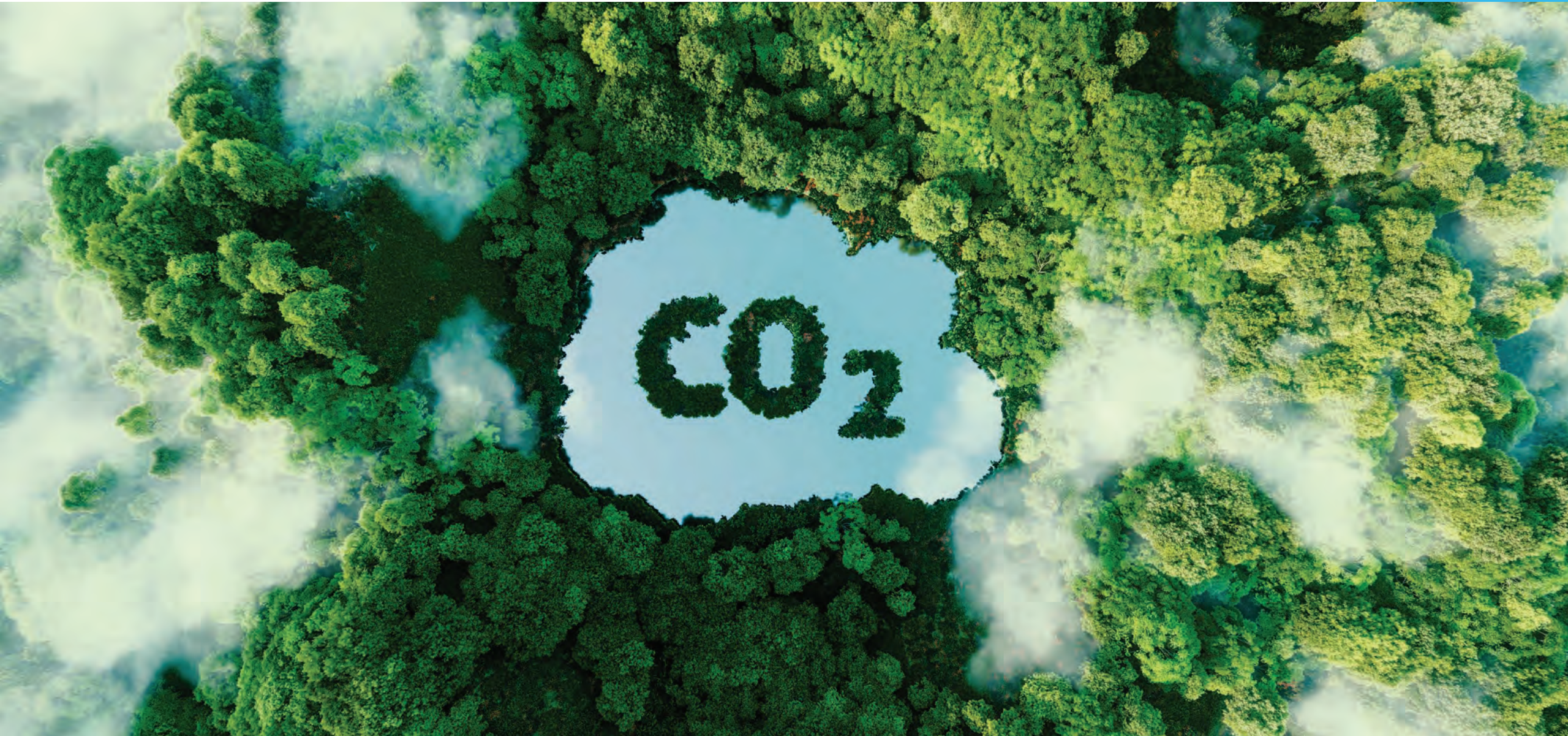
## Deepening our Stewardship Responsibilities

As we proceed with evaluating and understanding how our operations interact with the environment, we remain committed to doing everything within our power to reduce negative impact. We will continue investigating and investing in ways we can reduce the resources we consume and waste we produce.

Calculations in line with the [Greenhouse Gas Protocol](#).

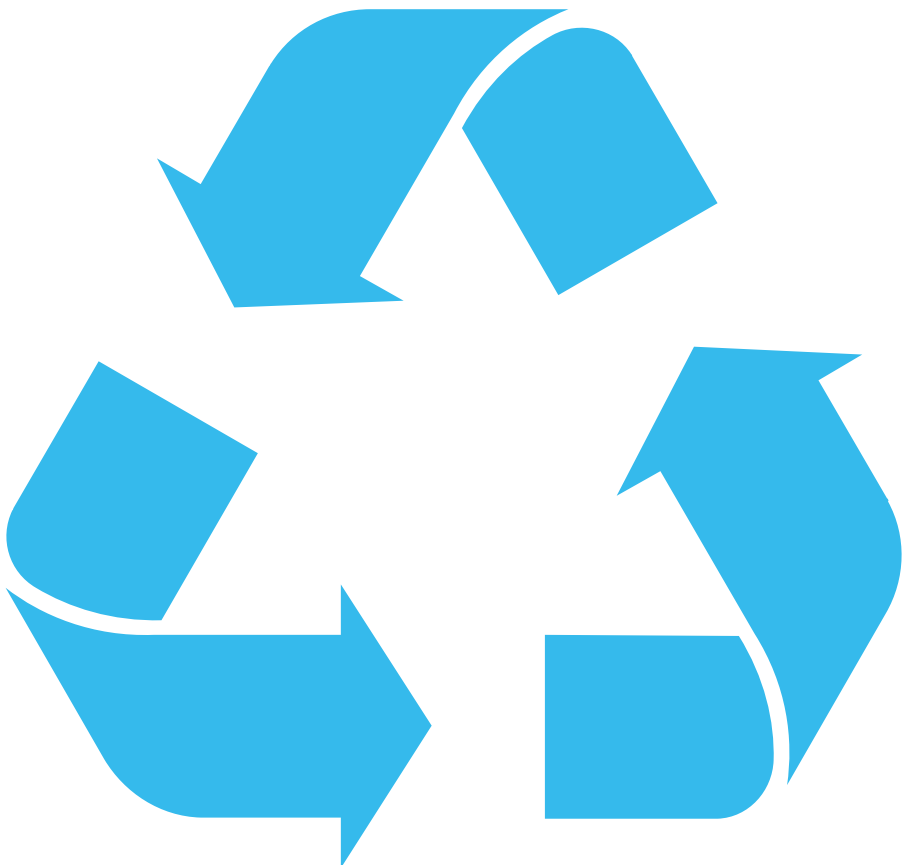


H&R Block submitted a 2022 CDP response demonstrating a commitment to environmental risk management and transparency.



### New Environmental Policy

As part of our commitment to conducting business in harmony with the environment, this year we developed our first enterprise level environmental policy. This policy codifies our commitment to conducting business in a manner that is as environmentally responsible as practicable, which includes better understanding and managing our environmental impacts and risks and ultimately decreasing our enterprise-wide carbon emission footprint. You can read that policy [here](#).



## Recycling

While our resource use is moderate compared to other industries, we remain committed to reducing consumption and recycling waste whenever possible. This year marks the second year we’ve partnered with Digitunity to help upcycle our computers and IT equipment. These devices are wiped, restored, and distributed to various nonprofit organizations across the U.S.  
**IN FY22 WE DONATED MORE THAN 13,000 PIECES OF EQUIPMENT THROUGH DIGITUNITY.**

In addition, this year we conducted an audit of our paper utilization and began developing plans to materially reduce our paper consumption over the next five years.



# Our Connected Culture

At our core, H&R Block is a people business. Our clients return to us year after year, across generations, because our associates and franchisees take the time to understand who they are as individuals and how we can help. That's why this past year we took purposeful steps to continue to build a Connected Culture, one where relationships are at the heart of how we work with each other, our clients, and in our communities.

# Advancing Diversity and Inclusion: Belonging@Block





Establishing a Connected Culture requires continual effort and is an ongoing process. We constantly reflect on our management approaches to improve diversity and inclusion in the workplace, which includes looking at how we can provide a sense of belonging within the company for our associates. **It's what we call, Belonging@Block.**

## COLORS at H&R Block

A Community for LGBTQ+ and Allies

COLORS (Community Organizing for LGBTQ+ Opportunity, Resources and Support) continued to provide an inclusive space for H&R Block's LGBTQ+ community and allies while cultivating understanding within the company and taking this to the communities we serve. This year, COLORS coordinated H&R Block's first participation in Kansas City PrideFest. In addition to joining the Pride Parade, members of the group also shared more about H&R Block's COLORS at all three days of PrideFest as a way to show our support of the local LGBTQ+ community.

## Neurodiversity at H&R Block

In 2022, we expanded our Neurodiversity@Block Belonging Group to celebrate and support neurodiversity in all forms — from neurodivergent associates to their leaders to associates supporting a neurodivergent loved one. We also introduced Rethink, new neurodiversity-focused benefits.

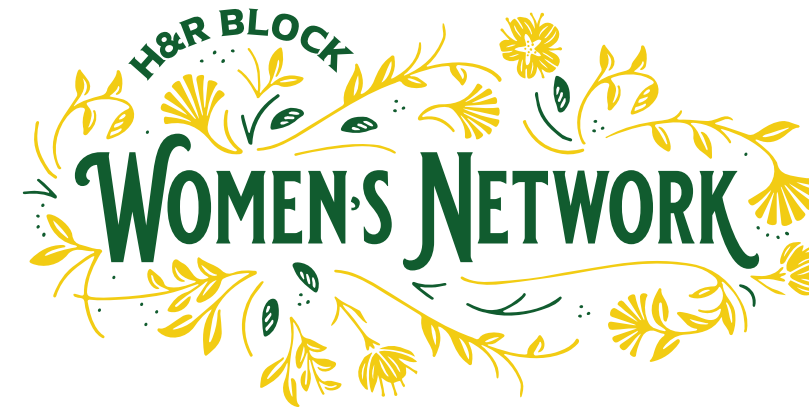
## YP Young Professionals

H&R Block's Young Professionals Network continues to help our younger associates become change agents and thought leaders. The group gave back to the community and partnered with Cards for a Cause, with associates creating nearly 450 cards for kids who were hospitalized. Young Professionals also played an important role serving as mentors to H&R Block's summer interns.

**In FY22, we expanded our Belonging Council membership by 50%, adding more diverse perspectives and creating richer experiences.**

## Veterans of H&R Block

The H&R Block Veterans Belonging Group provides a common and acknowledged voice for H&R Block military veterans ensuring support for their concerns, issues, and inclusion. This year, our Veterans Belonging Group encouraged its members to participate in the company's new Block Buddy program, pairing current associates with those new to H&R Block.



The H&R Block Women's Network connects, helps, and motivates women in their pursuit of professional success and personal fulfillment. This past year, the Women's Network enhanced its mission with a new focus to build relationships with existing networks and partner with more third parties to foster collaboration and empowerment.





# Additional Ways We Support Diversity and Inclusion



## Supplier Diversity

We have continued to focus on developing our supplier diversity program. Last year, our efforts included the purchase of a technology solution to improve tracking capabilities of our spend with diverse suppliers and a greater emphasis on including diverse suppliers in relevant competitive bidding situations. We’ve seen the inclusion efforts pay off in many ways including on a project at our Client Service Center in Kansas City where Monarch Build LLC, a woman-owned general contractor and construction management firm, won the competitive bid to build out a coffee shop. In FY22 we increased the number of diverse suppliers we worked with by 3%. We are committed to increasing our spend with diverse suppliers and are on track to meet our long-term goals.



## Racial Equity Action Plan

For the second consecutive year, we focused on core actions of our Racial Equity Action Plan. These include: 1) expanding our hiring practices to be more inclusive and result in a more diverse candidate pool for all positions within our company, 2) creating new opportunities for our associates to educate themselves, and each other, about racism, bias, and the importance of diversity, inclusion, and belonging, 3) enhancing existing trainings and providing new mandatory experiences to educate our leaders about racial equity, 4) ensuring our policies and business practices are explicit that any form of racial inequality is not tolerated within our company, and we will increase our efforts to promote and recognize important aspects of African American culture, and 5) committing to help create vibrant neighborhoods in underserved, urban areas, and generating opportunities for Black business owners to thrive, especially in our hometown of Kansas City. From doubling our recruitment outreach to historically Black colleges and universities, to including language from the Creating a Respectful and Open World for Natural Hair Act of 2022 — or “CROWN Act of 2022” — into our policies, we continue to expand the actions we can take to create more diversity, inclusion, and understanding at H&R Block.



## IT Accelerate Program

In May 2022, we launched the IT Accelerate program, intended to counter the nationwide trend of increasing competition for tech talent in a field with limited diversity. This program is designed for early career professionals, or those transitioning into tech roles from other career fields, to fast-track tech talent development and hire more diverse candidates for technical roles within the company. This 12-month program engages participants and provides an immersive onboarding experience, introducing candidates to the variety of technology opportunities at H&R Block and training them for long-term success within the company. To date, 35% of IT Accelerate program participants are Black, Indigenous, and people of color (BIPOC).

# Valuing our Associates

Fostering a Connected Culture includes remaining committed to our associates’ total well-being. We believe taking care of our associates significantly increases their job satisfaction and is instrumental to the company’s ongoing success.



## Talent Development

Our people are the number one enabler for living our Purpose. We want to attract, develop, and retain top talent who can take risks and act boldly. Our goal is to provide development opportunities to our associates that help develop them personally and professionally. We do this through a robust offering of programs, courses, and learning journeys offered virtually and in person to leaders and their team members.

We recently rolled out LinkedIn Learning, a benefit offered to all associates at the corporate office as well as full-time regular field associates. LinkedIn Learning offers dynamic content taught by industry experts for associates to learn new business, technology, or creative skills and share that content with their co-workers through likes and recommendations.

This past year we also added BetterUp to our development opportunities. Through this coaching platform, we offer two development options: one-on-one coaching for nominated individual contributors, managers, and directors, or coaching circles for small groups of self-nominated associates.



## Tax Training

Our unrivaled tax expertise is delivered through nearly 70,000 tax professionals. Each year, we provide best-in-class training and continue to expand our development programs to offer a variety of opportunities for our associates. This includes in-person classes, online courses, assessments, and a learning library. This year we added almost 120 new and updated tax theory courses, all offered in a variety of delivery methods. Each year, our tax professionals receive on average over 30 hours of Tax Education and over 16 hours of Continuing Professional Education.

In addition, we are expanding our tax professionals’ expertise by providing support for them to take and pass the Enrolled Agent (EA) Exam with the IRS. We are investing in tools and resources for our associates, and have enrolled more than 1,000 participants in EA study groups.



## Pay Equity

Our remuneration practices include regular assessments of compensation policies and data to ensure that our practices are optimally focused on merit, responsibilities, experience, and performance, rather than any factors not related to legitimate business concerns. Where there are questions about whether compensation is equitable, the company makes adjustments to ensure appropriate compensation for all associates. Additionally, H&R Block obtains regular legal advice with a view towards ensuring its compensation practices fully comply with all legal requirements.

# Block Reboot

Everyone working during the pandemic experienced heightened stress, burnout, and uncertainty. To reduce these challenges and to thank our associates for their resiliency and hard work, we introduced “The Annual Reboot,” a paid week of time off offered during the first week of July. This is an important time for our associates to disconnect, reboot, and recharge.



Gender Equity

At H&R Block, we strive to create a workplace where everyone feels connected to each other and their work. We continue the efforts we began in 2020 when H&R Block joined the Catalyst CEO Champions for Change pledge to increase the representation of women, including women of color, among senior leadership and Board of Director positions. As of June 30, 2022, 50% of our Board of Directors are women, and nearly half of our Senior Leadership Team are women.

Associate Relief Fund

In the early stages of COVID-19, our associates needed support, which is why we created the H&R Block Associate Relief Fund. Now in its second year, the fund has awarded over 90 grants totaling more than \$61,000 to our associates across the U.S., Canada, and India.

Inclusive Benefits

Our total rewards programs are designed to attract and retain top talent by giving them the full and customized support that they need to be their authentic selves. In January 2022, we introduced inclusive paid parental leave for both parents, up to \$30,000 for fertility, adoption, or surrogacy support for all family situations, and expanded our mental health support for our regular associates.

In addition, this year we added the Inclusive Care program, available to eligible associates and dependents through our medical plans. This program helps connect LGBTQ+ community members with culturally competent providers who are more knowledgeable about their unique needs. It also offers guidance for patients navigating the complexities of gender transition procedures and ensures their care team is aligned on the appropriate treatment plans. To learn more please see our press release [here](#).

CAPS Scholarship

Over the past 10 years, H&R Block has awarded more than \$1 million in scholarships through our Children of Associates Premier Scholarship (CAPS) program. The internal scholarship program for children and grandchildren of H&R Block associates and franchisees in the U.S. aims to identify students who go beyond academic excellence and dedicate themselves to improving their communities, connecting people, and making their blocks better. In FY22, we awarded 15 total scholarships, each worth \$10,000. Meet the recipients [here](#).



In FY22, we also took steps to promote equity for women through a campaign called, “A Fair Shot.” In July 2021, college athletes were allowed to earn income from their Name, Image, and Likeness (NIL).

Within just months of the rule change, female college athletes were not getting the same sponsorship opportunities as men — male student athletes had received 67.3% of the total compensation in collegiate sports as of December 2021 (via Opendorse) leaving female college athletes at only 32.7%. To help close the gap, H&R Block created “A Fair Shot,” and committed \$1 million in sponsorships, tax services, and support to female college athletes, giving each a fair shot at the money they deserve and a platform to speak for equity for women in collegiate sports. As our President and CEO Jeff Jones said, “This commitment draws from our Purpose to provide help and inspire confidence in our clients and communities everywhere. When we invest in female college athletes, we are helping to create a positive impact in society that’s good for all of us.” Learn more about the program [here](#).



# Awards and Recognition

We are proud of the recognition we received in FY22 from multiple organizations in many different categories, including:



**100% in the Human Rights Campaign's  
2022 Corporate Equality Index**



**Forbes: America's  
Best Large Employers**



**Forbes: America's Best  
Employers for Diversity**



**Forbes: America's Best  
Tax & Accounting Firms**



**2022 Great Place to  
Work® Certified**



**Forbes: World's  
Best Employers**



# More Communities Connect

Our community impact platform, Make Every Block Better, continues to support the communities where we live and serve. We remain dedicated to connecting neighbors to each other by improving the spaces and places where neighbors convene. We also believe supporting local communities means supporting small businesses, creating an environment where the spirit of entrepreneurship thrives.

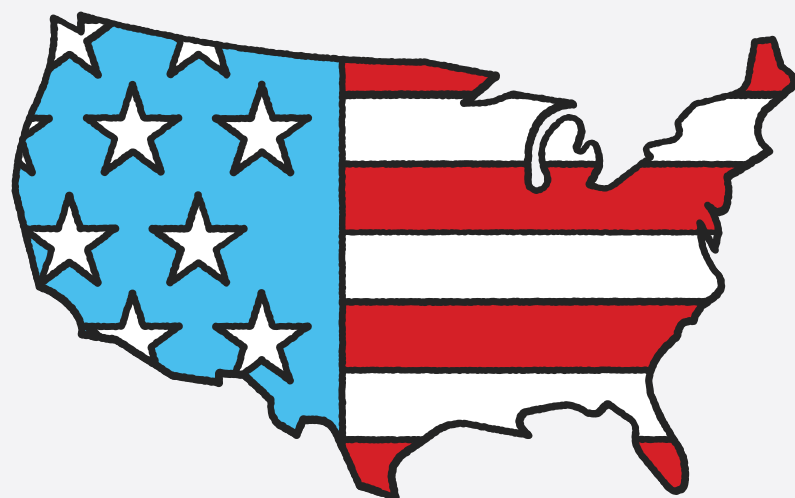
**We have logged more than 250,000  
volunteer hours across 960 communities  
and supported 732,000 small businesses.**

**2025 Goals:**



**IN PROGRESS**

**Performing 1 million  
volunteer hours by 2025**



**ACHIEVED**

**Impacting 500 communities  
and reaching all 50 states**



**ACHIEVED**

**Supporting 500,000  
small business owners**

Our progress in supporting communities and small business owners is made possible through several partnerships, including...



With a shared desire to improve the spaces around neighborhoods and create innovative programs that increase community connections, H&R Block has partnered with Habitat for Humanity for the third consecutive year. In FY22, H&R Block supported 15 communities across the country from Evergreen, Washington, to Greenville, South Carolina.



Funded by an H&R Block Foundation grant, the company partners with the Urban Neighborhood Initiative to host community-building events that foster neighborly relationships between residents, connects citizens to helpful resources, and makes home repairs possible throughout a historically disinvested and underserved area in the heart of Kansas City. To date, more than 50 projects have been identified and are in various stages of planning, construction, or completion.



The Neighborhoods Rising Fund (NRF) provides critical funding to help underserved neighborhood home associations throughout the seven-county Greater Kansas City area. The grants leverage residents' talents and energy to increase connections, support innovation, and create measurable community development. As the largest funder of the 2021 program, H&R Block helped support 37 community projects. You can read more about the NRF [here](#).



# Nextdoor

Our partners at Nextdoor share our belief that the more connected we are, the more resilient and vibrant our neighborhoods become. FY22 was the third year we called on neighbors across the country to nominate projects in their neighborhoods that will uplift and improve their communities and give neighbors a better chance to connect with one another.

Here are some of the ways we connected communities:

## Omaha, Nebraska

When neighbors noticed a beloved local Omaha landmark, known as the Viking Ship, starting to deteriorate and become overgrown, they decided to take action to restore the building to its former glory. Through Make Every Block Better, neighbors restored the exterior of the community center and hired a local, small landscaping business to complete ivy removal and assist with landscaping work. See the work in action [here](#).

## Wilmington, North Carolina

In Wilmington, North Carolina, Greenfield Lake is surrounded by a five-mile loop where neighbors see each other walking their dogs, exercising, and enjoying nature. With the support of Make Every Block Better, neighbors helped build a community garden. In collaboration with local businesses, they built new garden beds and seating and created a much-needed space in the neighborhood to grow produce along with community connections. See their progress [here](#).



# Disaster Relief

In December 2021, a deadly tornado outbreak caused catastrophic damage in Kentucky and Tennessee. H&R Block made a \$50,000 contribution to the American Red Cross and shared a donation micro site with our associates and social media followers so others could also support disaster relief efforts. In response to the disaster, two members of H&R Block's People & Culture team, Corey Gordon and Jack Carr, knew they had to help. Over their holiday break, they went to the devastated communities to saw trees and remove wreckage to help with the cleanup efforts.

**That's living out what it means to Make Every Block Better!**  
**We're proud of their efforts, which you can read more about [here](#).**



# Supporting Small Businesses

As part of our commitment to Make Every Block Better, we are continuing our important work of supporting small and diverse business owners. We believe communities thrive when its entrepreneurs are equipped for success and can provide valuable services that meet neighborhood needs.



To incentivize local innovation and prioritize small businesses in our hometown of Kansas City, we committed to a multi-year investment totaling \$2 million to the KCRise Fund II, a venture capital fund that invests in high growth, early-stage tech businesses.



## LGBTQ+ Microgrant Program

In 2022, Block Advisors, a part of H&R Block, started a new initiative to support LGBTQ+ small business owners. We are awarding \$5,000 microgrants to 10 LGBTQ+ small business owners throughout the year. In addition to the microgrant, each small business will receive complimentary H&R Block Advisors tax prep services in 2023 and will have its small business profile amplified on H&R Block and its Block Advisors content and social platforms. Meet two of the recipients — [Terrance Williams](#) and [Minky Kim](#).



In fall 2021, we funded microgrants for Black-owned businesses participating in a new small business program we piloted with the Urban League of Greater Kansas City. In 2022, we have a new cohort of Black-owned small businesses ready to improve their finances. Learn more about this program [here](#).



# Our Approach to Business

As a Purpose-driven company serving millions of clients around the globe, it is our responsibility to continually empower and inspire our associates, lead our business with integrity, help create vibrant communities with thriving entrepreneurship, champion diversity, inclusion and belonging, and reduce our environmental footprint. Managing these efforts is key to forming beneficial relationships with our associates, clients, and business partners, and is key to our long-term success.

# Ethics and Governance

H&R Block’s continued success is only possible through our comprehensive, robust, and ethical policies and open communication.

## Board of Directors

The responsible operation of our company begins with our [Board of Directors](#) (“Board”), who are committed to upholding ethical corporate governance practices that foster independent leadership. All Board members, with the exception of our CEO, are independent under applicable standards. Board members sit on a variety of committees, including the Audit, Compensation, Finance, and Governance and Nominating Committees, and must exercise their responsibilities in accordance with our [Corporate Governance Guidelines](#). H&R Block believes representation is key to inclusion and we remain committed to a diverse Board of Directors.

## Environmental, Social, and Governance

Our Corporate Governance Guidelines provide that our Board is responsible for oversight of the company’s policies, programs, and strategies regarding significant environmental, social, and governance (ESG) matters, which include, among other things, corporate social responsibility, environmental sustainability, and human capital management. The Board receives, at least annually, an ESG update from management and reviews ESG policies, programs, strategies, risks, and trends. The Board also has regular discussions each year on other human capital management topics, including diversity, inclusion and belonging, top talent, succession planning, and associate engagement. The Governance and Nominating Committee will review, and make recommendations regarding ESG matters when requested by the Board.

## Compliance and Ethics

Our continued success depends upon maintaining our reputation as a trusted partner by acting with integrity in all that we do. This can only be achieved through the honest conduct of every team member — from associates to Board members. Annual training for our [Code of Business Ethics and Conduct](#) underscores our commitment to ethics and provides associates with consistent, company-wide guidance on expectations of ethical behavior within our operations.

Operating transparently and ethically reinforces our Connected Culture, develops client trust, and helps to foster relationships across all management levels.

Human Rights

We remain committed to our associates’ total well-being — physical, mental, financial, career, team, and community — and seek to uphold human rights across our operations. This is demonstrated by our efforts to gainfully employ people, compensate them appropriately for their time, treat everyone with dignity and respect, and provide a workplace that is free from discrimination and harassment based on race, sex, religion, and other demographics. These rights are extended to all full-time, seasonal, franchise, and corporate associates. In FY22, we updated our human rights, labor, and business practices policy to more fully ensure human rights are respected and enforced at H&R Block.

Data Security and Privacy

Given the sensitive nature of the information that our clients share with us, we are dedicated to protecting their privacy through responsible management approaches and data security procedures. We utilize administrative, technical, and physical safeguards to secure client data and conduct annual training for all associates.

We seek to be as transparent as possible when it comes to client information we utilize, and how it is collected, used, shared, retained, and secured. For instance, we do not sell or rent our clients’ information (including social security numbers) under any circumstances. We use a multi-layered, zero-trust approach to secure systems and information while following the National Institute of Standards and Technology (NIST) Cybersecurity Framework. We protect our systems with critical security updates and perform penetration tests to identify and mitigate potential areas of weakness. Learn more about our privacy practices in our [Privacy Notice](#).



WE ARE PROUD TO ANNOUNCE THAT IN MAY 2022, OUR PRESIDENT AND CEO, JEFF JONES, JOINED THE COUNCIL FOR INCLUSIVE CAPITALISM.

Through this membership, H&R Block commits to measurable and meaningful acts that create equality of opportunity, equitable outcomes, and fairness across generations and to those whose circumstances prevent them from full participation in the economy. You can read more about our commitments [here](#).

Below is a table that references the topics from the Sustainability Accounting Standards Board’s (SASB) Professional and Commercial Services industry standards (now part of the IFRS Foundation).

TOPIC	CODE	ACCOUNTING METRIC	RESPONSE	PAGE
DATA SECURITY	SV-PS-230a.1	Description of approach to identifying and addressing data security risks	<p>H&amp;R Block, Inc. (“H&amp;R Block” or the “Company”) is committed to a risk-centric information security approach to secure our data, systems, and services. We prioritize our data security initiatives and processes based on our assessment of known and anticipated threats to the Company’s data security. Utilizing the National Institute of Standards and Technology (NIST) Cybersecurity Framework, we adhere to a philosophy of continuous improvement and utilize a metrics-based approach to identify and mitigate data security risks that could potentially impact our business operations.</p> <p>In addition to regular oversight through briefings to the President &amp; CEO, the Audit Committee of H&amp;R Block’s Board of Directors (“Board”) has oversight of data security and receives regular reports on these matters from the Chief Information Officer and the Chief Information Security Officer. The full Board is also updated on a periodic basis. In addition, data security is a top priority for ongoing oversight by the Company’s Enterprise Risk Committee, and it monitors the Company’s efforts to identify, review, and remediate potential data security risks and vulnerabilities. The Enterprise Risk Committee also provides information and reports to facilitate data security briefings for the Company’s Audit Committee and full Board.</p> <p>We maintain multiple levels of protection to mitigate data security risks, and we regularly test our systems to discover and address potential vulnerabilities, including without limitation:</p> <ul style="list-style-type: none"><li>• using a multi-layered, zero-trust principled approach to secure systems;</li><li>• systematic monitoring of our sites and services to detect and respond to unauthorized activity; and</li><li>• regular security audits and vulnerability assessments conducted by our dedicated internal information security team and by external third parties.</li></ul> <p>H&amp;R Block engages in a broad range of activities to secure and protect the data that we obtain through our business operations including, but not limited to:</p> <ul style="list-style-type: none"><li>• continued development and enhancement of our controls, processes, and practices designed to protect our systems, computers, software, data, and networks from attack, damage, or unauthorized access;</li><li>• security and business controls to appropriately limit access to and use of personal information, including adaptive and multifactor authentication;</li><li>• comprehensive data protections, including encryption, to facilitate the secure storage, use, and transmission of sensitive data;</li><li>• annual privacy/data security training to all employees and contractors and regular monthly awareness and testing activities regarding social engineering threats, such as phishing, for employees year-round;</li><li>• background checks on our employees, as permitted;</li><li>• due diligence requirements and controls for third parties (e.g., service providers) with access to sensitive data throughout the lifecycle of the relationship; and</li><li>• a dedicated information security team that partners with all technology groups to monitor, prioritize, and remediate risks to the enterprise.</li></ul> <p>A description of H&amp;R Block’s data security and privacy risks and how they are addressed are disclosed in Item 1A—Risk Factors of H&amp;R Block’s FY22 Form 10-K on pages 8-19.</p>	page 23

TOPIC	CODE	ACCOUNTING METRIC	RESPONSE		PAGE
	SV-PS-230a.2	Description of policies and practices relating to collection, usage, and retention of client information	<p>H&amp;R Block’s policies regarding the collection, usage, and retention of client information comply with the applicable data privacy laws in all applicable jurisdictions. We seek to be transparent when it comes to client information and how we utilize it. For instance, we do not sell or rent our clients’ information. The privacy notices for our products and services explain our practices relating to client information, including where applicable how we collect, use, and safeguard client information. In addition, our privacy notices and consent forms explain the choices clients have relating to such data. All employees and contractors are required to take annual privacy/data security training.</p> <p>H&amp;R Block’s privacy notices are publicly available online <a href="#">here</a>.</p> <p>A description of H&amp;R Block’s data security and privacy risks and how they are addressed are disclosed in Item 1A—Risk Factors of H&amp;R Block’s FY22 Form 10-K on pages 8-19.</p>		page 23
	SV-PS-230a.3	(1) Number of data breaches, (2) percentage involving clients; confidential business information (CBI) or personally identifiable information (PII), (3) number of clients affected	<p>Given the sensitivity of this data, H&amp;R Block will only disclose information in this area to the extent required by applicable law. Please see H&amp;R Block’s privacy notices to learn more about our approach to client privacy.</p> <p>H&amp;R Block’s privacy notices are publicly available online <a href="#">here</a>.</p>		page 23
WORKFORCE DIVERSITY & ENGAGEMENT	SV-PS-330a.1	Percentage of gender and racial/ethnic group representation for (1) executive management and (2) all other employees	EXECUTIVE MANAGEMENT	2022	pages 7–9
			Women	40%	
			EXECUTIVE MANAGEMENT	2022	
			White	70%	
			Black	0%	
			Hispanic	0%	
			Asian	20%	

TOPIC	CODE	ACCOUNTING METRIC	RESPONSE		PAGE
			Prefer not to Identify	0%	pages 7-9
			Native Hawaiian / Pacific Islander	0%	
			2 or more Races	10%	
			American Indian / Alaska Native	0%	
			ALL OTHER EMPLOYEES¹	2022	
			Women	77%	
			ALL OTHER EMPLOYEES¹	2022	
			White	51.4%	
			Black	18.3%	
			Hispanic	13.4%	
			Asian	7.3%	
			Prefer not to Identify	5.3%	
			Native Hawaiian / Pacific Islander	0.4%	
			2 or more Races	3.4%	
			American Indian / Alaska Native	0.6%	
	SV-PS-330a.3	Employee engagement as a percentage	Associates at H&R Block have an engagement score of 77, which is a positive indicator and 1 point above Glint, our survey provider’s worldwide benchmark for engagement (on a 100-point scale). Formerly owned by LinkedIn and recently acquired by Microsoft, Glint is a part of Microsoft’s Viva Employee Experience platform. Glint provides best in industry survey solutions for over 900 companies.		page 22

TOPIC	CODE	ACCOUNTING METRIC	RESPONSE	PAGE
PROFESSIONAL INTEGRITY	SV-PS-510a.1	Description of policies to ensure professional integrity	<p>H&amp;R Block maintains a Code of Business Ethics and Conduct (the “Code”), which requires all members of the Board of Directors, officers, and associates of the Company act ethically and in accordance with the policies set forth in the Code. The Code includes guidelines relating to the ethical handling of actual or potential conflicts of interest, compliance with domestic and foreign laws, accurate financial reporting, and procedures for promoting compliance with, and reporting violations of, the Code. In support of the Code, we have established several channels for reporting potential ethics violations or similar concerns or for guidance on ethics matters, including via email, telephone, or in-person communications. All individuals have the ability to report concerns or discuss ethics-related matters anonymously through our Ethics hotline. The Company will not take adverse action against anyone who, in good faith, reports an actual or perceived violation of the Code.</p> <p>Mandatory annual training for the Code underscores our commitment to ethics and provides associates with consistent, company-wide guidance on expectations of ethical behavior within our operations.</p> <p>The Code is overseen by the Company’s Chief Ethics Officer, who is appointed by the Company’s Audit Committee. To help ensure the Audit Committee’s effective oversight of our ethics and compliance program, the Audit Committee regularly receives reports from the Chief Ethics Officer and reviews matters related to the Company’s ethics and compliance program.</p> <p>Additional details regarding our approach to ensuring professional integrity can be found in the full Code of Business Ethics and Conduct, which is available <a href="#">here</a>.</p>	page 22
	SV-PS-510a.2	Total amount of monetary losses as a result of legal proceedings associated with professional integrity	<p>In FY22, the Company did not have any material monetary losses as a result of legal proceedings associated with professional integrity that required disclosure.</p>	N/A
ACTIVITY METRIC	SV-PS-000A	Number of employees by: (1) full time and part time, (2) temporary, and (3) contract	<p>In our Company owned offices, we had approximately 3,800 regular full-time associates as of June 30, 2022. Our business is dependent on the availability of a seasonal workforce, including tax professionals, and our ability to hire, train, and supervise these associates. The highest number of persons we employed during the fiscal year ended June 30, 2022, including seasonal associates, was approximately 69,900.</p> <p>Additional details regarding employee numbers can be found in H&amp;R Block’s FY22 Form 10-K on page 5.</p>	N/A
	SV-PS-000B	Employee hours worked, percentage billable	<p>Not applicable to the Company’s business, as employees do not work on a billable basis.</p>	N/A

<sup>1</sup> Includes all full-time, part-time, and seasonal associates of the Company and Company-owned office locations as of March 31, 2022.

