

Welcome to

TAX SEASON

2026



H&R Block Product Guide

Thank you for your interest in H&R Block! We hope you find this guide to H&R Block's industry-leading tax preparation services, capabilities and offerings beneficial as you help tax filers with what they need to know for tax season 2026.

Our products are continually improving. To ensure you have the latest information or to speak with one of our experts, please contact our agency partners or the H&R Block media desk at mediadesk@hrblock.com

For media assets, click [here](#), or for a downloadable media kit, click [here](#).

For helpful tips and information, visit hrblock.com and follow us on [TikTok](#), [Instagram](#), and [Facebook](#).

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■ Why It's Better With H&R Block

For most Americans, filing taxes is the most significant financial moment of the year. H&R Block makes filing less taxing by providing expert support needed to get the maximum refund without charging more and upfront transparent pricing. At H&R Block, we pride ourselves in offering more value to our clients by including more capabilities and support without the additional costs, upselling or hidden fees.

70 years of helping hardworking Americans

As the pioneer of the tax preparation category 70 years ago, H&R Block (NYSE: HRB) is trusted to help ensure the best possible outcome at tax time with less stress by combining the latest technology that enables individuals to file how and when they want with the support of unmatched human expertise backed by the unparalleled expertise of The Tax Institute.

- 980 million+ tax returns filed worldwide
- 22 million+ tax returns prepared last year

Unmatched tax expertise

The Tax Institute, H&R Block's team of tax attorneys, CPAs, and enrolled agents, constantly monitors and analyzes federal and state tax code changes. It equips H&R Block's tax professionals and DIY products with the latest insights, ensuring every taxpayer's unique situation — whether due to life changes or evolving tax laws — is addressed accurately.

H&R Block's vast network of tax professionals, supported by The Tax Institute's expertise, provides unmatched guidance that helps clients get back or keep every dollar they've earned. By combining human expertise with cutting-edge technology, H&R Block can identify tax credits and deductions that reduce liability and maximize refunds.

- 60,000 tax professionals in the U.S., with an average of 11 years' experience
- 9,000 offices — locations in every state and within 5 miles of most Americans

Enhancements for This Tax Season

- **AI Tax Assist Expansion:** AI Tax Assist, powered by Microsoft Azure, OpenAI and The Tax Institute at H&R Block, provides unlimited, contextual tax help 24/7 for DIY Online clients in paid tiers. This tax season, AI Tax Assist is also available in Desktop Software, offering instant answers to suggested questions as clients work through their returns.
- **Tax Pro Review Free Promo for New Clients:** Through Feb. 15, 2026, new DIY Online clients in paid tiers can add Tax Pro Review at no cost. A tax professional will double-check their return for missed deductions, credits, and accuracy, then sign and file the return for added assurance.
- **Product Selector and Streamlined Onboarding:** Clients can now access our enhanced Product Selector feature to ensure they're using the best H&R Block filing product for their unique tax situation and get a price quote for tax prep before entering any data. It's easier than ever for DIY filers to begin tax prep with simplified imports and easy switching from other tax providers.
- **Form Search and Deductions/Credits Double Check:** New tools in the DIY software help users quickly locate any tax form and double-check for missed deductions and credits before filing, maximizing refunds and streamlining the process.
- **Virtual Filing:** Those wanting help from a tax professional with the convenience of staying home can file virtually through H&R Block's secure client portal, MyBlock. Simply create an account and upload documents through this secure client portal, and once the return has been accurately completed by a tax professional, clients can log back into MyBlock to review, pay and approve. Clients will be able to message their tax professional at any time throughout the process.
- **Sidekick:** New this tax season H&R Block launched an AI tool called SideKick. SideKick is an AI assistant for tax pros giving them quick, reliable answers in the moment eliminating the need to call or search for additional support. SideKick pulls from H&R Block's own trusted tax and technical resources to help preparers confidently explain tax topics, resolve issues, and keep appointments moving smoothly. By reducing time, SideKick allows tax pros to stay focused on the client in front of them, offer clearer explanations and deliver a faster, more seamless experience for the simplest to the most complex tax situations. Appointments are more efficient, accurate, and reassuring for clients, making the overall tax filing experience easier and more satisfying.

■ Multiple Ways to File Your Taxes

H&R Block strives to make filing as easy and convenient as possible by offering more ways to file and providing expert support along the way tailored to each unique tax situation — whether you're self-employed, a student, a homeowner, reporting investment income, or navigating life changes — to ensure the best possible tax outcome.

- **In-Office:** File in as little as one hour with the option to drop off or in-person appointment with one of the more than 60,000 company tax professionals at one of our 9,000 offices — locations in every state and within 5 miles of most Americans.
- **Virtual:** Submit your information and tax documents at your own convenience thru our secure client portal or app (MyBlock) and allow our expert tax professionals to complete your return virtually. Communicate via secure messages 24/7 with your pro along the way
- **DIY Online:** File on your own with H&R Block's DIY online but not alone. AI Tax Assist and Live Tax Pro Support included at no additional cost in paid tiers, providing real-time answers and expert guidance whenever you need it. Add Tax Pro Review to your DIY Online return to have a pro double-check you've done everything correctly and provide the assurance of a professionally signed return.
- **DIY Software:** Download our award-winning desktop software, trusted by millions of Americans for over 20 years, now enhanced with AI Tax Assist to deliver unlimited, in-product tax help 24/7 as filers complete their return. From step-by-step guidance to real-time answers to your tax questions, our DIY software combines powerful tools with expert support to make filing your taxes straightforward and stress-free.

For tax filers who aren't sure which is best for them, H&R Block provides a **Help Me Choose** feature that will recommend the best tax prep option based on an individual's situation and preferences simply by answering a few questions.

However you file taxes, we've got you.

-52% of filers qualify for Free Online. Simple tax situations only (Form 1040 and Earned Income Tax Credit, Child Tax Credit, Student Loan Interest, and Retirement Plan Distributions). [Learn more](#)

File on your own with confidence

Nearly 52% qualify for free — easy guided steps for simple returns.

- Great for W-2, students, or unemployment income
- Upload docs from any device

Starting at
\$0
+ \$0 state additional for paid products
*simple returns only

[File on my own](#)

File online with help by your side

Online support from live tax pros and AI Tax Assist.

- Great for families, freelancers, or investors
- Accuracy and ease from start to finish

Starting at
\$35
+ \$37 per state filed

[File with some help](#)

File stress-free with a tax pro

Full, personalized support from home, in person, or both.

- Taxes prepared by an expert in as little as one hour
- Choose your pro or get matched based on your needs

Starting at
\$99
+ additional state fee

[File with a tax pro](#)



Get a free Second Look® Review. Only at Block.

We'll review your past 3 years of tax returns to find errors and money that's rightfully yours, just with a simple digital signature. [Learn more](#)

[Work with a pro](#)

Do Your Own Taxes on Any Device

For those who prefer to prepare their own taxes, H&R Block provides several options for DIYers, including free federal filing for simple returns. Approximately 55% of U.S. tax filers qualify to file for free with H&R Block.

- **Free**¹ — Ideal for simple tax situations like filing a 1040 form without complex deductions or investments. It includes more than 40 forms and covers unemployment income, earned income credits, and education credits, including student loan interest (1098E) or tuition payment (1098-T) at no extra charge.
- **Deluxe** — Suitable for itemized deductions and slightly more complex tax situations, such as homeowners and those with child and dependent care expenses.
- **Premium** — Designed for complex tax situations, including cryptocurrency, stock sales, and rental property income. It provides guidance for additional tax forms and schedules, such as D and E.
- **Self-Employed** — Tailored for self-employed individuals, gig workers, freelancers, and independent contractors. It supports tracking and deducting business expenses and calculating self-employment taxes.

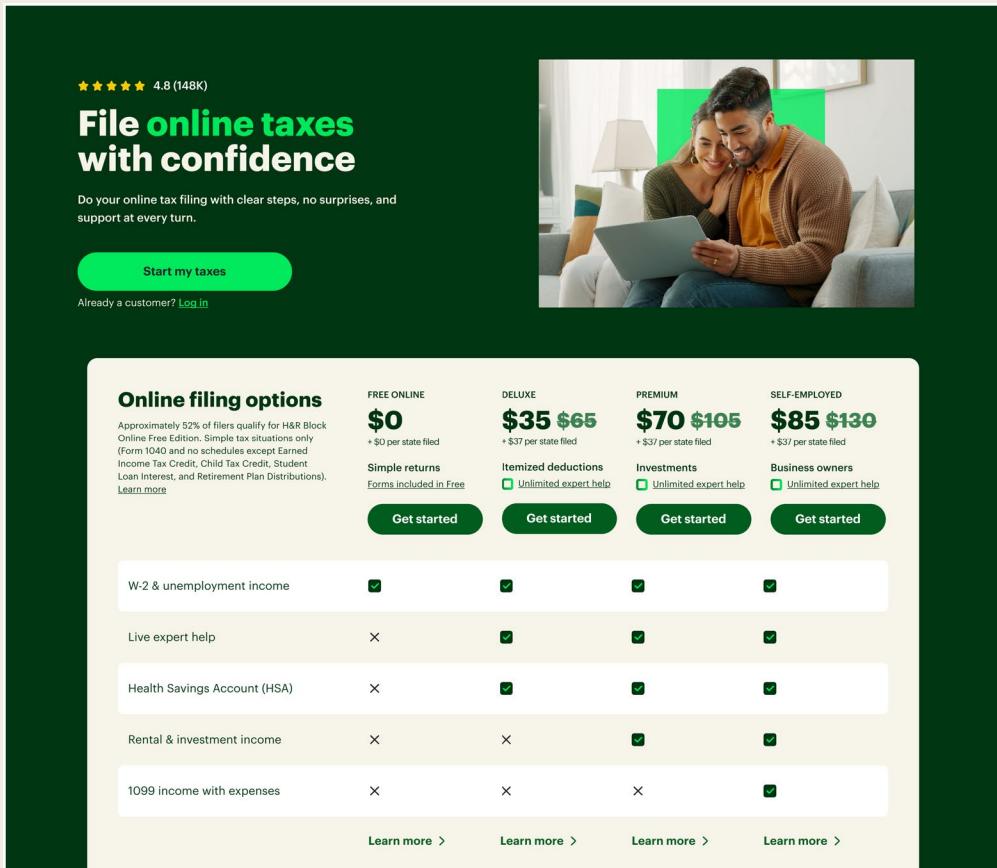
Not sure which option is right for you? Get started for free and we'll guide you to the right choice based on your needs. If your return includes itemized deductions, crypto transactions, or other complex forms, we'll guide you seamlessly to the appropriate plan so you can continue filing without starting over.

¹ Approximately 52% of filers qualify. Simple tax situations only Form 1040 and no schedules except Earned Income Tax Credit, Child Tax Credit, Student Loan Interest, and Retirement Plan Distributions. Find eligibility requirements at HRBlock.com/free.

Streamlined DIY filing experience

Filing taxes yourself is easier than ever with our streamlined online experience. From simplified onboarding and transparent pricing to tools that maximize refunds, we make tax prep fast, easy, and stress-free.

- **Dynamic Product Selector** — Clients tell us about what happened in their lives last year to get a price on tax prep before they enter any data.
- **Upfront Transparent Pricing** — No hidden fees or surprises. No kidding. We have simple, competitive, transparent pricing to ensure you know exactly how much you will pay at the start of the tax filing process.
- **Less Work** — H&R Block has streamlined the filing process from start to finish, reducing steps and simplifying data imports, to make DIY filing easy.
- **Form Search** — Quickly locate any tax form within the software - no more hunting for tax forms – making DIY filing easier and more efficient.
- **Credits and Deductions Double Check** — We help clients double check their return for any missed deductions and credits before filing to maximize their tax outcome.



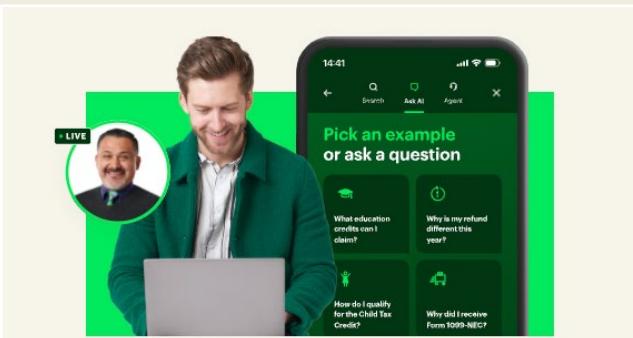
The screenshot shows the H&R Block online tax filing landing page. At the top, it features a 4.8 rating (148K reviews). The main headline is "File online taxes with confidence". Below this, a sub-headline reads "Do your online tax filing with clear steps, no surprises, and support at every turn." A "Start my taxes" button is prominently displayed. To the right, there is a photo of a smiling couple sitting on a couch, looking at a laptop together. The page then displays "Online filing options" with four pricing tiers: "FREE ONLINE" (\$0), "DELUXE" (\$35-\$65), "PREMIUM" (\$70-\$105), and "SELF-EMPLOYED" (\$85-\$130). Each tier includes a "Get started" button. Below the tiers is a table comparing features across five income types: "W-2 & unemployment income", "Live expert help", "Health Savings Account (HSA)", "Rental & investment income", and "1099 income with expenses". The table shows which features are included in each tier. At the bottom of the table, there are "Learn more" links for each category.

Income Type	FREE ONLINE (\$0)	DELUXE (\$35-\$65)	PREMIUM (\$70-\$105)	SELF-EMPLOYED (\$85-\$130)
W-2 & unemployment income	✓	✓	✓	✓
Live expert help	✗	✓	✓	✓
Health Savings Account (HSA)	✗	✓	✓	✓
Rental & investment income	✗	✗	✓	✓
1099 income with expenses	✗	✗	✗	✓

Pricing is subject to change. Visit hrblock.com for current pricing.

File On Your Own with Expert Help

Our belief is that individuals who want to file on their own, should not have to do it alone and they shouldn't have to pay more to get help from an expert. That is why H&R Block provides AI Tax Assist and Live Tax Pro Support with H&R Block DIY Online Plus, Deluxe, Premium or Self-Employed editions without any additional fees. Our AI-powered guidance, live tax pros, and review services work together to ensure every credit, deduction, and opportunity is accounted for — giving clients confidence at every step.



Unlimited expert help

Do your own taxes with confidence. Get free access to AI Tax Assist and live human help when you file with **Deluxe**, **Premium**, or **Self-Employed**.

Start my taxes

AI Tax Assist

Now available on desktop, AI Tax Assist provides unlimited tax help 24/7 to empower clients to confidently complete their returns from start to finish. DIY clients can ask questions specific to their tax situation, such as how a particular regulation or tax law applies to them and get instant answers without leaving the product flow as they actively work on their tax return.

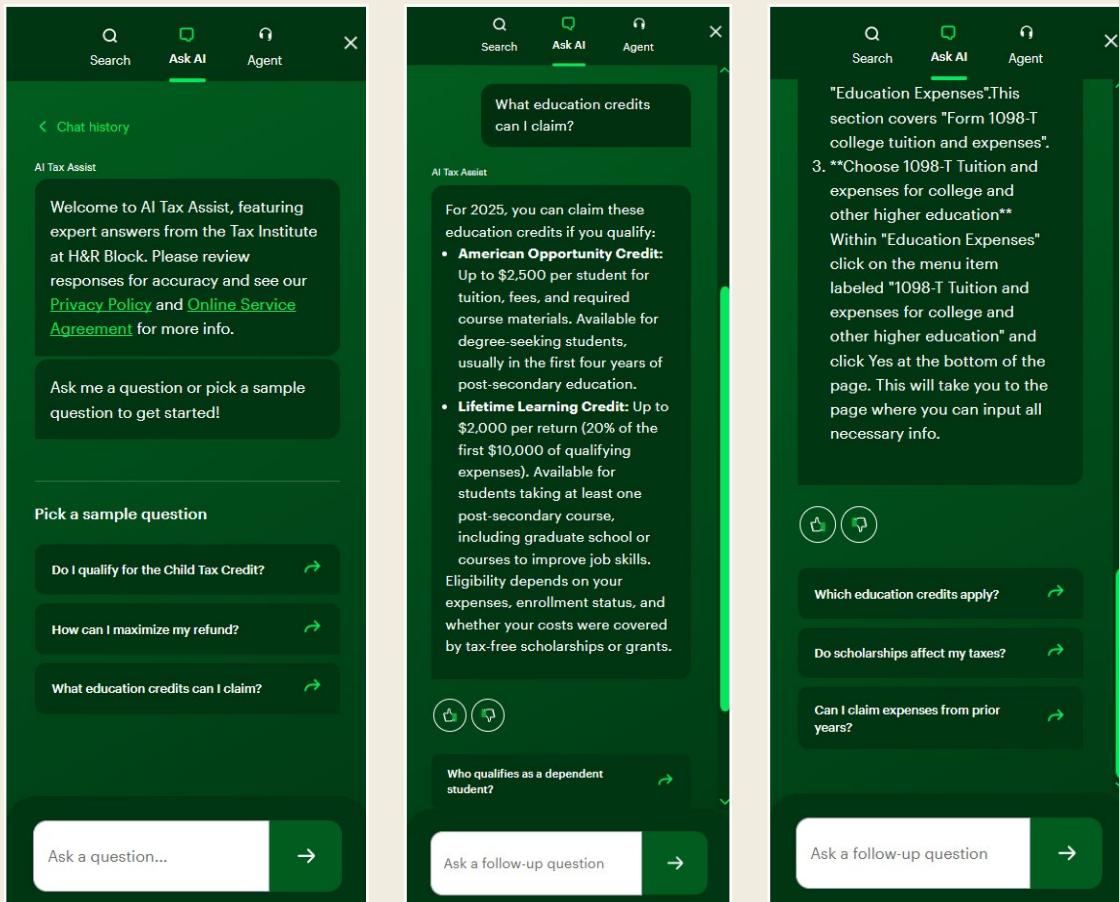
Powered by Microsoft's Azure OpenAI, AI Tax Assist combines the expertise of The Tax Institute and 70 years of trusted tax expertise with the power and efficiency of artificial intelligence to provide real-time, reliable tax filing assistance backed by 100% accuracy and maximum refund guarantees².

² Limitations apply. Visit hrblock.com/guarantees for more information.

How it works

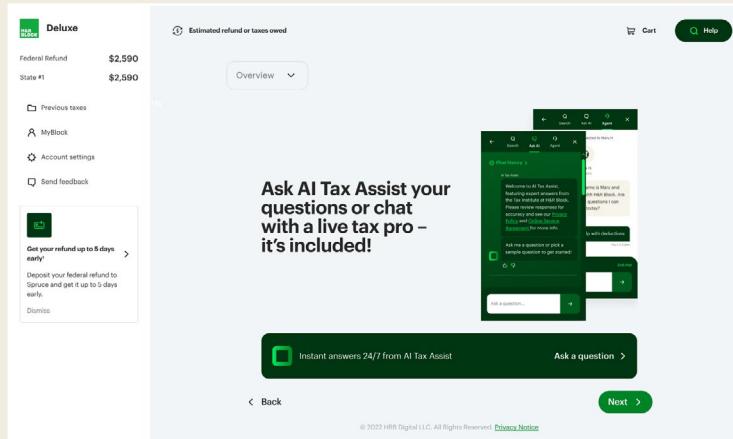
A team of H&R Block CPAs, tax attorneys and Enrolled Agents in The Tax Institute translate complex state and federal tax rules and program the technology with this information to enable AI Tax Assist to generate contextual and conversational answers when asked a question about a variety of questions, such as:

- Information on tax forms, deductions, and credits to maximize potential refunds and minimize tax liability.
- Demystify complex tax terms, give guidance on specific tax rules and provide general information about the U.S. and individual state tax systems.
- General tax knowledge and recently changed laws and tax policies. It can offer multiple scenarios to check for refund changes year-over-year.
- Product support to walk clients through using H&R Block DIY products. On desktop, AI Tax Assist provides tax knowledge support, excluding in-product navigational guidance.

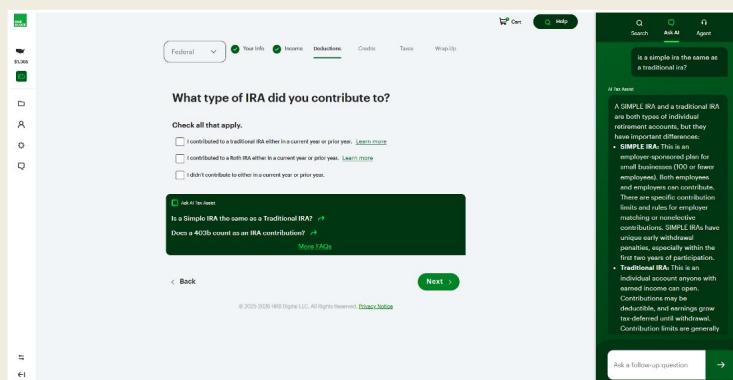


Key features

- **Convenient panel:** The easy-to-find AI Tax Assist panel is available in the Help Center. Once the AI Tax Assist panel is opened, it will stay open on the right side of the screen until closed, allowing clients to ask questions and get help anytime, without leaving the program, as they actively work on their tax return.



- **Easy Q&A interface:** The simple question and answer interface allows clients to ask unlimited questions, view the answer, and ask follow-up questions. Clients can also revisit previous conversation threads, ensuring continuity and a personalized experience.
- **Contextual suggested questions:** As clients are working on their taxes, they'll also see suggested questions from AI Tax Assist on some pages to help them with that page. Clicking on the question will open AI Tax Assist, and they'll receive an immediate answer.



- **Feedback mechanism:** Clients can provide thumbs up or thumbs down feedback on responses, refining the tool's performance to meet their needs.



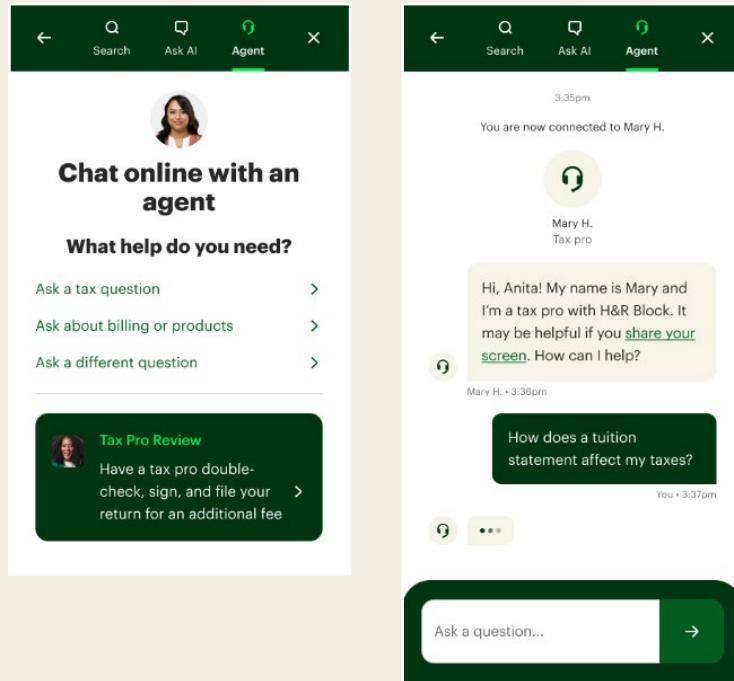
Live Tax Pro Support

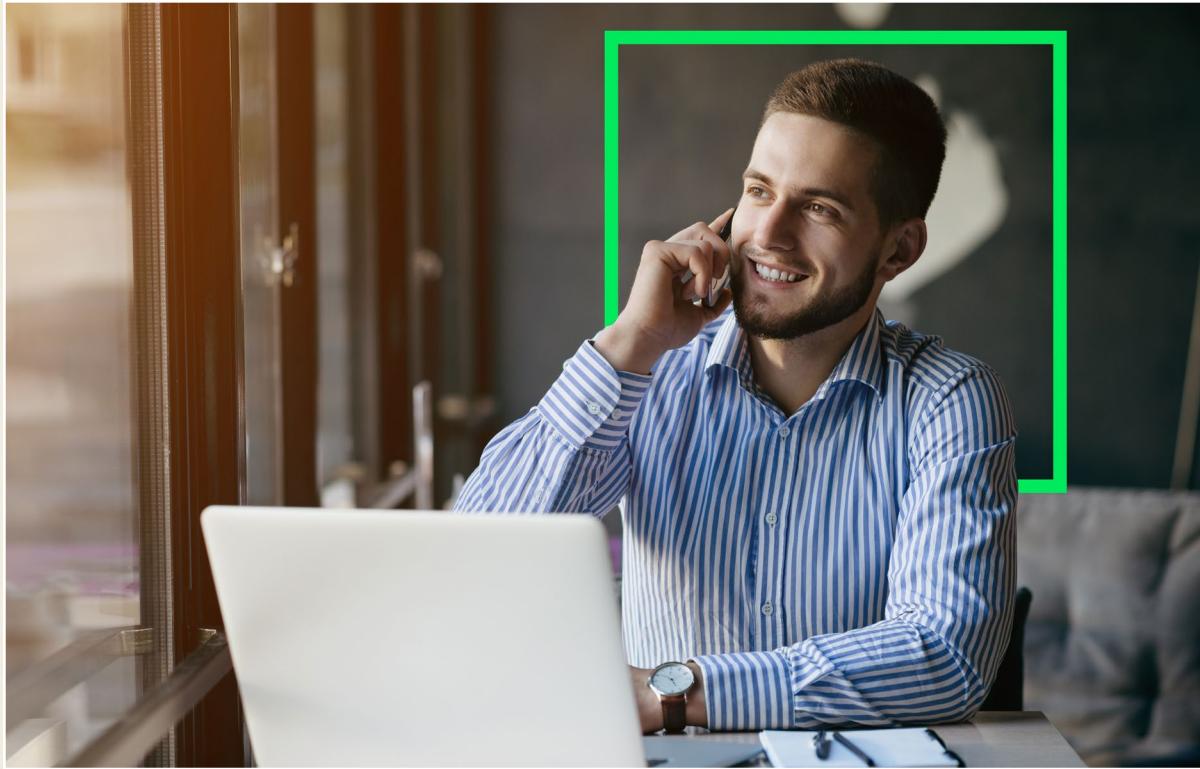
While others charge an extra fee for human assistance and reassurance, H&R Block provides unlimited expert help at no charge with DIY Online Deluxe, Premium and Self-employed options.

	 H&R BLOCK	 INTUIT turbotax	 FreeTaxUSA	 TaxSlayer
Expert Help Availability	All paid products	TurboTax Live Assisted	Pro Support	TaxSlayer Premium
Expert Help Cost	Included in all paid products	\$39 basic \$79 deluxe \$159 premium	\$44.99	\$42.95
Conversational GenAI	Yes	Yes	No	No
Human Help	Yes	Yes	Yes	Yes

Based on publicly available info as of January 7, 2026.

Connect with a tax professional for help as you complete your online filing. Tax pros are available 8 a.m. to 9 p.m. CST Monday through Friday — and seven days a week during tax season — by choosing the Agent icon at the top of the Help Center.





Wrap Up With Confidence

Wrap Up With Confidence allows the client to have an expert review (without source documents) their DIY tax data entries via live chat and ask questions to ensure things look good and build their confidence. Wrap Up With Confidence is included at no additional charge in our paid editions.

A screenshot of the Spruce tax software interface. At the top, there's a navigation bar with 'Deluxe' (highlighted in green), 'Refund Status', 'Cart', 'Help', and a search icon. Below the navigation, there are tabs for 'Federal', 'Your info', 'Income', 'Deductions', 'Credits', 'Taxes', and 'Wrap up' (which is also highlighted in green). A 'Smart filing, smart review' box is visible, containing the text 'Let a pro look it over and wrap up with confidence.' and a 'Chat with a tax pro' button. The main content area features a large green button with the text 'Nice work! Your Federal return looks spotless.' Below it, a message says 'Everything looks filled out, complete, and error-free. You're making this look easy.' and a 'Onward!' button. On the left, there's a sidebar with options like 'Previous taxes', 'MyBlock', 'Account settings', and 'Send feedback'. A modal window on the left says 'Get your refund up to 5 days early!' and 'Deposit your federal refund to Spruce and get it up to 5 days early.' with a 'Dismiss' button. At the bottom, there's a 'Save & Exit' button.

Have A Pro Prepare Your Taxes

File with your neighborhood tax expert

H&R Block has a vast network of tax pros including 60,000 tax professionals in the U.S. and 70,000 globally, with an average of 11 years' experience. The tax pros are available to meet with you in-person or virtually, ensuring each customer gets the same level of service and expertise regardless of how they choose to file. We offer many secure, convenient ways to work with our tax pros.

File with your neighborhood tax expert

With 70 years of expertise, we've seen it all. Get started with your local H&R Block expert, however you want.

[See how much you'll pay](#)

[Meet with an expert](#) [File from home](#)



Cheronda R.
Tax Pro

Jessica B.
H&R Block
Customer

File however you want



From home >

Pressed for time? Connect with your tax pro remotely by uploading your documents from your phone, computer, or tablet.



In person >

Make an appointment at an office near you and sit down with a tax pro who will prepare your return.



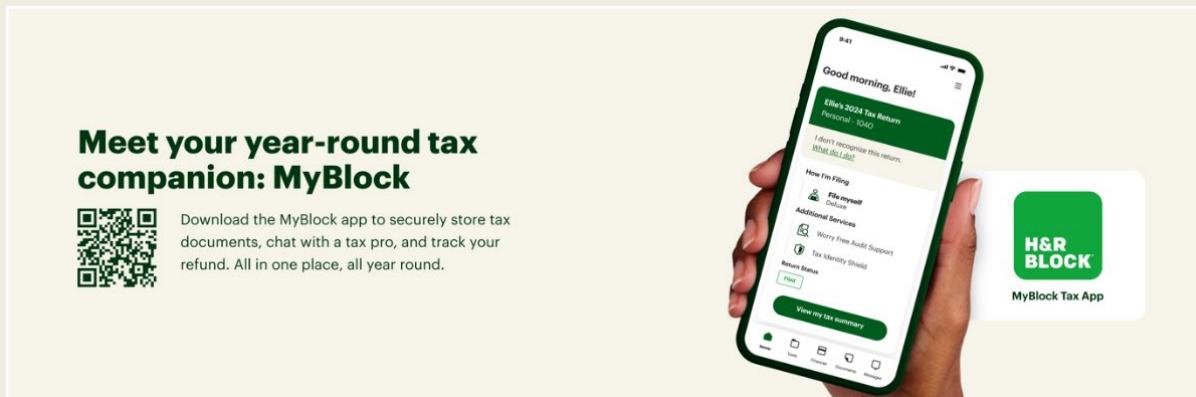
Drop off >

Drop off your docs at a local office. Review, approve, and sign your completed return virtually through the MyBlock app.

- **From home:** Work with a tax pro from the comfort of your home and on your own time. We'll walk you through submitting your information and uploading documents through our secure client portal or our mobile app, MyBlock. You'll have the flexibility to pick your own tax professional to work with or let us match you with the right tax pro for you. Then let the pro take it from there! Once your return is ready your tax pro will reach out, walk you through your outcome for you to approve and file all through our client portal or mobile app. You can connect with your tax pro anytime via secure messaging for your convenience.
- **In-person:** File at one of our 9,000 U.S. offices — locations in every state and within 5 miles of most Americans.
- **Drop off:** Drop your tax documents off at your local H&R Block, and your pro will handle the rest. You can also schedule a quick chat at drop-off if you have questions.

Free resources to make filing convenient and efficient

In addition to convenience, we provide free tools and resources on hrblock.com to ensure clients can file efficiently.



- **MyBlock app:** MyBlock is a safe, efficient, and convenient way to work with H&R Block tax pros while managing your finances year-round. This digital tax companion lets you securely store documents, jumpstart a return, chat with a tax pro, book and manage appointments, track refunds, and manage your budgeting and bookkeeping — all from your phone or desktop. Whether it's tax season or beyond, MyBlock helps you stay organized, informed, and financially confident

- **Tax Prep Checklist** — Answer a few questions to create a customized tax prep checklist based on your tax situation.

TAX PREP CHECKLIST

Get ready to file your taxes

Wondering what tax documents you need? Get prepared with our tax checklist or answer a few questions to quickly create a customized tax checklist of your own.

[Create checklist](#) [View full checklist](#)

SSN or tax ID number

Forms W-2

Real estate and personal property tax records

- **Tax Refund Estimator** — Answer a few questions, and our tax calculator will estimate your tax refund or the amount you might owe the IRS, updated for tax year 2025.

TAX REFUND ESTIMATOR

Simplify tax season with our tax calculator

Answer a few questions, and our tax calculator will estimate your tax refund or the amount you might owe the IRS, updated for tax year 2024.

[Calculate my refund](#) [Start my taxes](#)

How the tax calculator works

Answer simple questions

Tell us about your income & expenses

Calculate your estimated tax refund

Ready to get a head start on your tax planning? [Calculate my refund](#)

■ Helping Small Businesses and the Self-Employed

H&R Block provides full-service small business support — including tax preparation — and DIY tax preparation for the self-employed backed by the human care and expertise for which we are known.

- **Work with a Block Advisors small business certified tax pro.** Block Advisors is the one-stop shop for small businesses to get help with year-round tax preparation and business services, including business formation, bookkeeping, payroll, and beneficial ownership reporting.

The screenshot shows the H&R Block website. At the top, there is a dark green header with the text "Meet the experts at Block Advisors" and three service options: "File with a tax pro virtually", "Drop my files off at an office", and "Meet with a tax pro in-office". To the right, there is a portrait of a woman named Carolina B., a Tax pro, with the text "Small Business Certified". Below this, there is a section titled "Optimize your business, all year long" with three service options: "Bookkeeping", "Payroll", and "Business Formation". Each service has a small image, a brief description, and a "Schedule free consultation" button.

- **File on your own with DIY Online Self-Employed:** Tailored for self-employed individuals, gig workers, freelancers, and independent contractors. It supports tracking and deducting business expenses, calculating self-employment taxes, and handling other aspects relevant to self-employment income.

H&R Block DIY Self Employed

Gig economy jobs turn workers into small business owners

Whatever term you use independent contractor, freelancer, or gig worker, you'll have additional tax responsibilities when you're self-employed.

Tailored for self-employed individuals, gig workers, freelancers, and independent contractors, H&R Block's **DIY Self Employed online edition** supports tracking and deducting business expenses, calculating self-employment taxes, and handling other aspects relevant to self-employment income.

Gig Workers

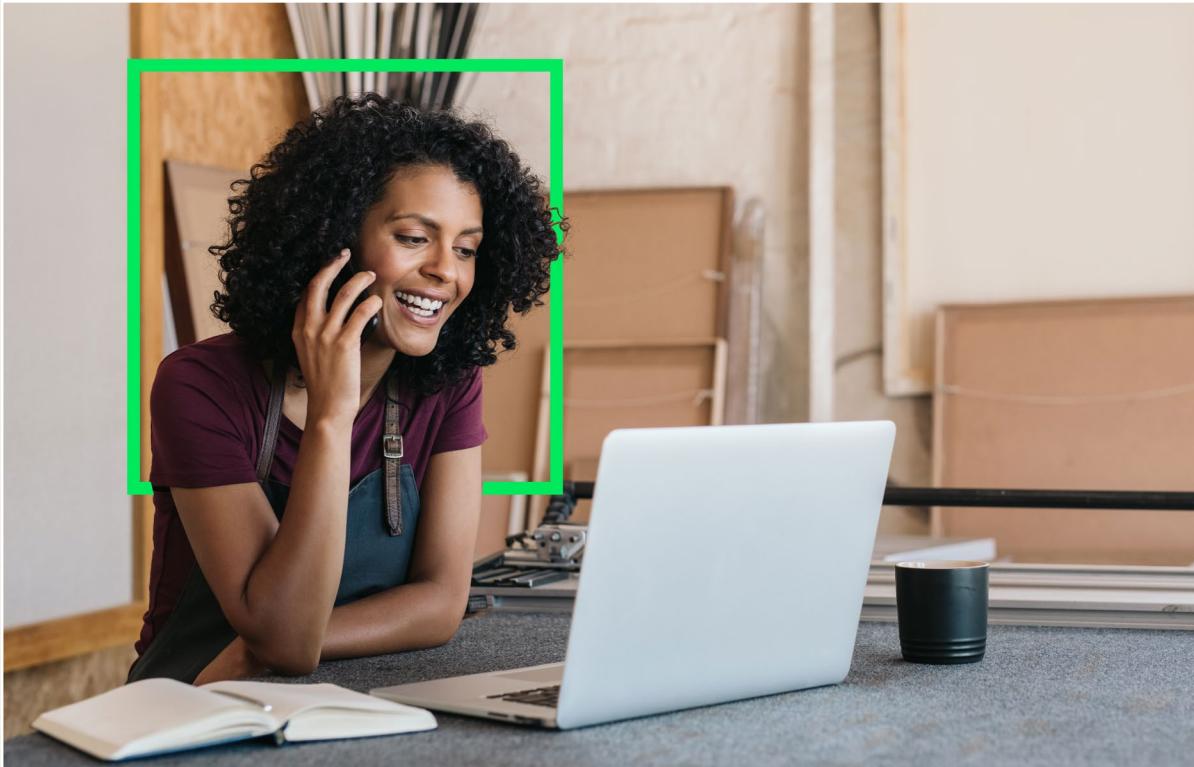
Do gig workers' pay taxes? Yes, but how it works is very different if you're used to filing taxes with a W-2 job.

Deductions lower your income, helping you lower your overall tax bill. Self-employed and gig workers can take advantage of tax deductions that individuals can't.

Gig economy tax deductions

- Mileage deduction or car expenses — understand your options
- Qualified business income — 20% deduction for certain entity types
- Health insurance — up to 100% deduction for your qualified premium

The screenshot shows the H&R Block DIY Self Employed software interface. At the top, there's a navigation bar with a green 'Cart' icon and a 'Help' button. The main area has a title 'What kind of work do you do?' with a sub-instruction: 'Choose the kind of work that best fits your business or profession. Select more than one if you have multiple businesses, including [side gigs and part-time work](#). We'll build a business profile and file a separate Schedule C for each one you select.' Below this, there's a section for 'Get your refund up to 5 days early!' with a 'Dismiss' button. The central part of the screen displays a grid of business types, each with a radio button and a description: Content Creators, Consulting, Taxi, Rideshare, or Delivery; Artists, Writers, and Performers, Direct Selling, Educational Services; Janitorial Services, Beauty Services, and Real Estate. At the bottom, there's a 'Show more business types' button.



Independent Contractors

Many people are surprised that as an independent contractor, they actually own a small business in the eyes of the Internal Revenue Service. And small businesses have extra tax rules — and potentially more IRS audits and notices — making filing taxes as an independent contractor complicated. Whether a gig job is the primary source of income or a side hustle, these individuals have more requirements, including:

- Quarterly estimated tax payments
- Payroll tax deposits and filings
- Reporting payments to contractors each year
- Reporting sales tax
- State and local licensing requirements

Because of all these rules, they will interact more with — and be scrutinized — by the IRS and their state revenue offices.



**Multiple income streams?
No problem.**

From full-time work to part-time gigs, we've seen it all, and we have the tax prep options to prove it.

Common problems when filing taxes as a self-employed worker

- **Not paying self-employment taxes** — Whatever term you use (independent contractor, freelancer, or gig worker), you'll have additional tax responsibilities when you're self-employed. On top of your income taxes, you'll owe another 15.3% tax. This is called self-employment tax and it covers Social Security and Medicare taxes. It can result in a large tax bill if you didn't know about it.
- **Not reporting cash payments** — Many small businesses, especially gig workers who operate in cash, are on the honor system for reporting their income. And with cash-intensive businesses, the IRS has few, if any, Forms 1099 to validate the income. It makes sense then, that every IRS audit of small businesses starts with scrutiny about whether the business reported all its income.
- **Not filing on time (or, at all)** — The failure to file penalty is 5% per month (or partial month) that the return is late, for a maximum penalty of 25%. If you file your return more than 60 days late (including extensions), the minimum penalty is 100% of your unpaid tax or \$485, whichever is smaller. The IRS receives information about your income through various tax forms. For example, in recent years, the IRS has identified many non-filers with Form 1099-K, which reports payments the business receives from debit/credit cards and third-party processors.

■ Helping Students Find Every Dollar

With the high cost of college, students need to find every deduction and credit possible. Students who pay for higher education and student loans can claim education deductions and credits, such as the American Opportunity Credit, Lifetime Learning Credit, student loan interest deduction, qualified tuition programs and education savings accounts.

Approximately 52% of Americans, including most students, qualify for H&R Block's Free DIY Online option³. And H&R Block's Free DIY Online option supports the essential forms needed to take advantage of these deductions at no additional charge, including student loan interest (1098-E) or tuition payment (1098-T).

- **1098-E (aka "the Student Loan Interest Statement")** — is sent by the loan lender and shows the interest paid during the year on a qualified student loan (sometimes called a qualified education loan). Individuals may deduct the lesser of \$2,500 or the amount of interest actually paid during the year as an adjustment to income.
- **1098-T (aka "the tuition tax form")** — helps to capture one of those great tax perks you don't want to miss out on. The 1098-T tuition statement is sent by the college/university and reflects the total payments of qualified education expenses (in Box 1) to the college/university within a tax year. Think of it as a receipt for your qualifying higher education payments. Note that this form doesn't include expenses you paid to businesses outside of the college/university. It's important to keep receipts and records of education expenses paid to avoid missing out on a benefit.

It is important to note that scholarships and grants that exceed education expenses are taxable income. There are some exceptions where they are not, but the excess of these awards generally should be included as income along with any room and board, travel, and equipment provided by the university.

³ Approximately 52% of filers qualify. Simple tax situations only Form 1040 and no schedules except Earned Income Tax Credit, Child Tax Credit, Student Loan Interest, and Retirement Plan Distributions. Find eligibility requirements at HRBlock.com/free.

Students and parents should also note that there are two education credits available to them as well. The American Opportunity Credit is a partially refundable credit for educational expenses during a student's first four years of college. The credit is up to \$2,500 with up to \$1,000 of that being refundable.

The Lifetime Learning credit is a nonrefundable credit that is available even if a student isn't in their first four years of college. The credit is worth up to \$2,000.

Free resources for students

Taxes can be tricky for any taxpayer. Filing taxes as a college student can be even more intimidating, especially for first-time filers. H&R Block provides free resources for students that explain tax benefits, tax forms, and the tax implications of financial aid.

To learn more, click [here](#).



Switch to H&R Block in About 2 Minutes

Switching to H&R Block is seamless and easy, and importing your prior year's tax return from another provider takes about two minutes. Additionally, take advantage of convenient methods to bring in your tax documents and forms reducing manual entry and saving time.



Switch to H&R Block in ~2 min

Just upload a PDF of last year's return, and we'll automatically import your data.

[Start my taxes >](#)

Direct Import

We make switching from TurboTax⁴ to H&R Block's online tax filing products quick and easy for clients in paid tiers. Using Direct Import, roughly 150 fields from your prior year's return are securely transferred by entering your TurboTax login, saving time, reducing manual entry, and minimizing errors.

Scan & Go

Even if you didn't use TurboTax, we make it easy to switch from other preparers. No need to scan your docs or manually enter your W-2. Grab your phone, take a picture of your docs, and you're all set.

Drag & Drop

While using H&R Block's tax software, importing your tax information is a convenient way to get a head start on filing your return, and you'll avoid manual entry of your forms and other details. The tax information you can import includes information from your W-2, 1099 forms, and other financial information.

⁴ TurboTax is a registered trademark of Intuit, Inc.

Get Every Dollar You Deserve

Tax Pro Review

We'll double-check your completed DIY return with Tax Pro Review

A life event — like a relationship change, the purchase of a new home or unexpected stock portfolio gains (or losses!) — can impact and complicate your taxes. Our tax pros understand this and have an eye for unique tax situations. This add-on feature gives you the best of both tax prep worlds.

By adding Tax Pro Review to one of our online DIY filing options, you'll have the benefit of a knowledgeable tax professional checking your completed tax return to make sure you get every tax credit and deduction you are eligible for, spot errors or omissions and potentially even reduce the amount you owe the IRS or get more money back.

It can give you the reassurance you need to know you are maximizing your tax refund and minimizing your tax liability.

Now through Feb. 15, 2026, new DIY Online clients in a paid selection (Plus, Deluxe, Premium, Self-Employed, Small Business) can add Tax Pro Review free.

TAX PRO REVIEW

File on your own but never alone with Tax Pro Review

Do your own taxes then have a tax pro double-check for any errors, mistakes, or money left behind.

You can add Tax Pro Review to any of our do-it-yourself tax prep options.

[See how it works](#)

Know the price before you start

Your total price is determined by adding the cost of your do-it-yourself tax prep option (Free, Deluxe, Premium, Self-Employed) with the cost of Tax Pro Review.

DIY Tax Prep + Tax Pro Review = Your Total Price

Free **Deluxe** Premium Self-Employed

Deluxe
+ Tax Pro Review

Best for:

- Homeowners
- Health Savings Accounts (HSAs)
- Itemized deductions
- Childcare expenses

See forms included in Deluxe

Your total price
for Deluxe + Tax Pro Review.

\$110
+\$40 per state filed

Start with Deluxe

Start your taxes with
Deluxe + Tax Pro Review.

How it works:

- To add Tax Pro Review, complete your federal and state returns with us online.
- After you see your tax summary screens, you'll will have the option to add "Tax Pro Review" to your return. The cost of Tax Pro Review is based on your tax filing complexity.
- Your tax professional will typically contact you within 24 hours of receiving your return. At that point, they'll review the information you've submitted and request any additional documents needed for your return. Then, they'll check your return and notify you when it's ready for your review and approval. If you have questions along the way, you can contact them at any point through the Message Center.
- Once you review and approve your return, your tax pro will sign and file your return.



Second Look®

We find money others miss, and more

Millions of Americans unknowingly miss out on tax benefits or credits they're entitled to every year, effectively leaving billions of dollars behind.

H&R Block offers **a free Second Look® tax review**⁵ to double-check up to three years of prior tax returns for missed credits and deductions. Common missed deductions include education credits, Child Tax Credits and Earned Income Tax credits.

⁵ At participating offices. Results vary. All tax situations are different. Fees apply if you have us file an amended return. The IRS allows taxpayers to amend returns from the previous three tax years to claim additional refunds to which they are entitled. Applies to individual tax returns only.

Only one in three taxpayers itemize but millions more should.

For many taxpayers, owning a home is what unlocks itemization because the largest itemized deductions are typically mortgage interest and real estate taxes. Once itemizing is worthwhile, taxpayers can also deduct other qualifying expenses, like charitable donations, personal property tax, state and local income taxes or sales taxes, limited medical expenses and limited employee business expenses and other miscellaneous expenses.

Individuals and business owners may be eligible for certain natural disaster relief provisions, including those who had disaster-related losses not reimbursed by insurance.

A qualified tax professional can help identify ways to lower taxable income and claim all eligible tax benefits.



Get a review of your last 3 tax returns with Second Look®. It's free.

We'll review your past 3 years of tax returns to find money that was missed
or errors that should be corrected.

[Find an office](#)

We Guarantee Our Work

At H&R Block, we have your back. That's why we offer so many guarantees. Whether you file taxes in person, online, or with our tax software, you can be sure these H&R Block guarantees are in place to protect you during the process. For more information visit: hrblock.com/guarantees.

- **100% Accuracy** — If there's an error on your return due to H&R Block or our software, we'll reimburse you for any resulting penalties and interest.
- **Maximum Refund** — If you discover an H&R Block error on your return that entitles you to a larger refund (or smaller tax liability), we'll refund the tax prep fee for that return and file an amended return at no additional charge.
- **No Surprise** — We'll tell you the price upfront and then keep you updated if anything changes.
- **100% Satisfaction** — If you are unhappy with the H&R Block tax preparation software before filing, H&R Block will refund the full purchase price, excluding shipping, handling, taxes, and any rebates. And for tax preparation services at our offices, you only pay us if you accept your return.

For every tax return, we guarantee:

100% Accuracy

If there's an error on your return due to H&R Block or our software, we'll reimburse you for any resulting penalties and interest.

Maximum Refund

If you discover an H&R Block error on your return that entitles you to a larger refund (or smaller tax liability), we'll refund the tax prep fee for that return and file an amended return at no additional charge.

No Surprise

We'll tell you the price upfront and then keep you updated if anything changes.

[See all our guarantees >](#)



Alla
Alla B.
Tax Pro, 10 years

Putting 70 Years of Tax Knowledge to Work for You



20 million+
filed with us in 2024



5+ million
How many people switched to H&R Block in 2024*



950+ million
tax returns worldwide

About H&R Block

H&R Block, Inc. (NYSE: HRB) provides help and inspires confidence in its clients and communities everywhere through global tax preparation services, financial products, and small-business solutions. The company blends digital innovation with human expertise and care as it helps people get the best outcome at tax time and also be better with money using its mobile banking app, Spruce. Through Block Advisors and Wave, the company helps small-business owners thrive with year-round bookkeeping, payroll, advisory, and payment processing solutions. For more information, visit H&R Block News.

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