Company Fact Sheet

Company Overview

H&R Block, Inc. (NYSE: HRB) is a leading global provider of tax preparation and financial services. Founded in 1955 by brothers Henry W. Bloch and Richard A. Bloch, the company has grown from a single office in Kansas City, Missouri, to a company with operations in the United States, Canada, and Australia.

The company offers a full spectrum of tax preparation, small business, and financial services, delivered through in-person, virtual, and digital experiences that are designed around client needs, not channels. Across every service, H&R Block blends innovative technology with human expertise and care to help people reach the best possible outcome.

At tax time, the company serves millions of clients through retail offices, digital platforms, and tax professionals backed by The Tax Institute, H&R Block's team of attorneys, CPAs, and enrolled agents. Named CNET's Best Overall online tax service for 2026, H&R Block leverages digital innovation and AI to help clients achieve optimal tax outcomes.

Beyond tax season, H&R Block helps clients manage their money year-round with Spruce*, its mobile banking app. For small business owners, the company offers bookkeeping, payroll, advisory, and payment processing solutions through Wave.

H&R Block supports and inspires confidence in its clients and communities everywhere. For more information, visit **hrblock.com**.

Our Purpose

To provide help and inspire confidence in our clients and communities everywhere.

Our Vision

To empower financial freedom for our clients through trust and technology.

Operations & Scale

GLOBAL PRESENCE:

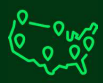
- Approximately 11,000 retail tax offices worldwide
- Operating in United States, Canada, and Australia with technology centers in India and Ireland
- Locations in every U.S. state and within 5 miles of most Americans
- Approximately 20 million clients served annually
- One billion tax returns prepared since 1955

GLOBAL WORKFORCE:

- Approximately 4,300 regular full-time associates
- Nearly 60,000 tax pros



11K OFFICES WORLDWIDE



LOCATIONS IN EVERY U.S. STATE



ONE BILLION RETURNS PREPARED

KEY FACTS

FOUNDED: January 25, 1955
FOUNDERS: Henry W. Bloch & Richard A. Bloch

PRESIDENT & CEO: Curtis Campbell
CHAIRMAN: Richard A. Johnson
CFO: Tiffany Mason

WEBSITE: hrblock.com
STOCK SYMBOL: NYSE: HRB

Tax Filing Your Way: Choose Full-Service Assisted or DIY Online Option

Assisted, full-service tax preparation led by a trusted expert, available in office or virtually.

- **In Office:** Full-service delivery with a trusted Tax Pro at a local office. Scheduled by appointment or walk-in to receive face-to-face tax preparation and guidance.
- **Virtual:** Remote, human-assisted delivery that pairs clients with a Tax Pro who prepares, reviews, and files their return end-to-end as a fully virtual service, no office visit required.

KEY FEATURES FOR ASSISTED TAX PREP:

- One-on-one preparation by a trained Tax Pro backed by The Tax Institute
- Support for complex tax situations, including life events, multiple income sources, credits, and deductions
- Year-round tax planning and guidance to get the most out of your return come tax time
- Secure digital document upload and year-round access to return information

Do-it-yourself filing with DIY Online, self-serve and technology only.



An option designed for people who want to prepare their own taxes online with access to a Tax Pro in the Virtual Network without the need to come into an office.

KEY FEATURES OF H&R BLOCK ONLINE:

- Unlimited expert help included with paid online products
- Tax Pro Review option for added confidence before filing
- AI Tax Assist: generative AI-powered guidance for real-time tax help
- Smart product selection based on life situation

Small Business Services

Year-round tax and financial support for small businesses and entrepreneurs. H&R Block provides small business owners and entrepreneurs with comprehensive support at every stage, from startup to scaling, compliance to strategic planning.

KEY FEATURES:

- Assisted and DIY business tax preparation *(sole proprietors, LLCs, S-corps, C-corps, partnerships)*
- Bookkeeping and payroll services, business formation, comprehensive support and advisory services delivered by experts
- Wave accounting software for invoicing, bookkeeping, and financial management

Financial Services

Tools designed to help clients access, manage, and grow their money. Financial products are available at H&R Block that can help clients build longer-term financial confidence.

KEY OFFERINGS INCLUDE:

- Spruce Checking and Savings* with tools to manage money year-round
- End-of-year and tax season loans available for qualified applicants**
- Refund-related financial solutions to help clients access funds when needed

* Spruce fintech platform is built by H&R Block, which is not a bank. Bank products by Pathward®, N.A., Member FDIC.

** Loans originated by Pathward®, N.A. Terms apply.

Awards & Recognition

CNET
- Best Overall Tax Software (2026)
- Best Use of AI (2026)

Forbes
- America's Best Employers for Women (2026)

Fortune
- America's Most Innovative Companies (2026)
- Best Large Workplaces in Financial Services & Insurance (2025)

Newsweek
- America's Best Online Platforms (2026)
- America's Greatest Workplaces for Culture, Belonging & Community (2026)
- America's Most Admired Workplaces (2026)

Time
- America's Best Companies (2026)
- America's Most Iconic Companies (2026)

USA Today
- America's Best Customer Service – Financial Services (2026)

Milestones

1955: Founded in Kansas City, MO by brothers Henry and Richard Bloch

1956: Expands to New York and launches franchise model

1962: Becomes a public company (NYSE: HRB)

1986: Helps IRS test e-filing

2004: Introduces new filing method combining DIY tax prep with tax pro review

2017: Integrates AI via IBM Watson into its tax preparation experience

2019: Acquires Canadian fintech company Wave Financial to strengthen small business offerings

2023: Launches AI Tax Assist, providing generative AI-powered tax help for customers

2023: Recognized by Fortune as "America's Most Innovative Companies"

2025: Marks 70 years of helping individuals and small businesses navigate taxes

Contact Information

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INVESTOR RELATIONS
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