



2023 ESG Report



“Our Purpose is to provide help and inspire confidence in our clients and communities everywhere. As part of this Purpose, we believe in doing our part to be a responsible corporate citizen, which has been a part of our culture and aspirations from the very beginning.”

Dear Stakeholders,

At H&R Block, our Purpose is to provide help and inspire confidence in our clients and communities everywhere. As part of this Purpose, we believe in doing our part to be a responsible corporate citizen, which has been a part of our culture and aspirations from the very beginning.

Our environmental, social, and governance (ESG) initiatives are not just about compliance; they are in harmony with our digital transformation and are integral to our Purpose and long-term success. This report reflects our ongoing commitment to transparency, sustainability, and responsible business practices in key areas such as environmental impact, social responsibility, corporate governance, stakeholder engagement, and more.

This is our fourth annual ESG report, covering fiscal year 2023 (July 1, 2022 – June 30, 2023), and we are proud of the progress we have made and the path we are on:

In the **Environmental** landscape, in FY23 we developed a comprehensive greenhouse gas (GHG) emissions inventory for our global operations, in line with the GHG Protocol, to provide greater transparency on our operational impacts. We also launched our ‘Path to Print Less’ initiative as we believe we can materially reduce paper usage over the next several years by reducing print sets, continued client adoption of virtual tools, and scanning documents.

On the **Social** front, we continue to live out Henry and Richard Bloch’s legacy of service, develop new solutions and experiences that help ease the financial burden of our clients, support our associates, and give back to our communities.

- Last summer, we commemorated the life and legacy of our co-founder Henry Bloch by proclaiming what would have been his 100th birthday as ‘Make Every Block Better Day’. In honor of this milestone, 100 teams of H&R Block associates volunteered throughout the community.
- In January of 2023, we launched our mobile banking platform, Spruce, in our tax offices. Spruce has empowered clients to be better with money, grow their financial health, and build financial literacy. Feedback from users indicate that the available tools give them the visibility and control that they have been missing in their financial lives.
- In February of 2023, in partnership with the H&R Block Foundation and the Marion and Henry Bloch Family Foundation, we pledged \$10 million towards the South Loop Link project in Kansas City, where our world headquarters is located. This investment will make the downtown area more inclusive, equitable, and vibrant while providing job opportunities and access to healthier lifestyles. A more sustainable downtown with improved air quality, reduced noise, and a commitment to prioritize pedestrians, cyclists, and multimodal transportation will be created and empowered as a result.

In regards to **Governance**, we strive to maintain a culture of integrity, transparency, and accountability throughout all levels of our organization. As we navigate this ever-changing landscape, we remain committed to furthering our integration of ESG considerations into our decision-making processes, fostering a diverse and inclusive workplace, understanding and reducing our environmental footprint, and actively engaging with our stakeholders.

I invite you to learn more about our efforts and the progress we continue to make within this comprehensive report. Together, we can continue to create a positive impact.

Thank you for your continued support and engagement.



Jeffery J. Jones
President and Chief Executive Officer





About H&R Block

At H&R Block, we care about our clients, associates, communities, the environment, and our corporate governance. Through our widespread network of 60,000 seasonal tax professionals, 10,000 tax offices worldwide, leading digital tools, and industry first technologies, we are a global leader in tax preparation, financial services, and small business solutions.

With humble beginnings in 1955, our co-founders Henry and Richard Bloch officially launched H&R Block from a single office in Kansas City, Missouri. The Bloch brothers were intentional about creating a company based on strong values and a desire to serve. Decades later, we continue to build on our founders' legacy by living our Purpose every day of providing help and inspiring confidence in our clients and communities everywhere.

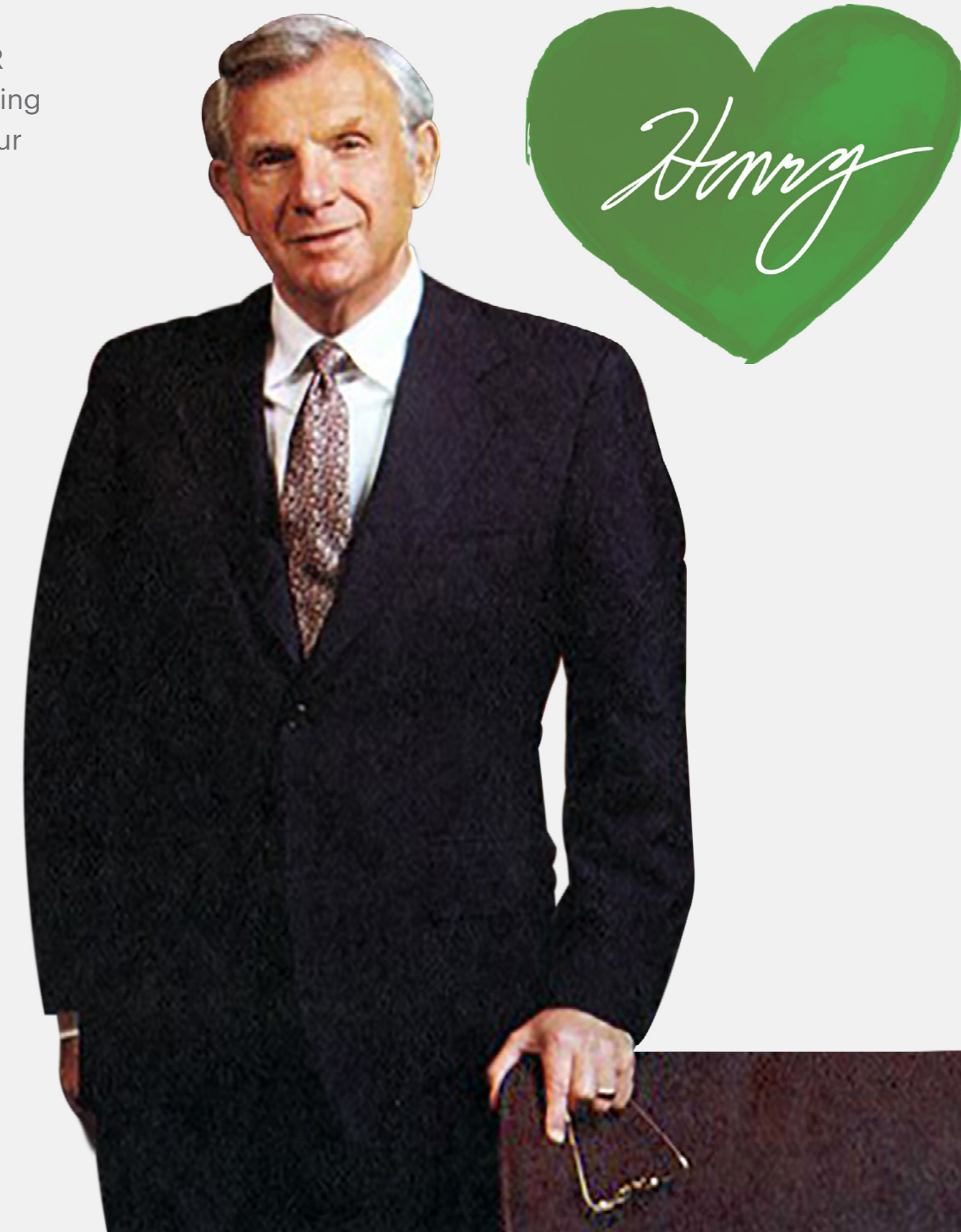
July 30, 2022 would have been Henry's 100th birthday. He played many roles in his lifetime, including father, husband, friend, entrepreneur, author, mentor, war hero, and philanthropist. Last summer, we were privileged to commemorate his life and legacy at our corporate headquarters. We worked with the city of Kansas City, Missouri, to proclaim July 30, 2022, Make Every Block Better Day (pictured in the bottom left are President & CEO Jeff Jones, former CEO and Bloch family member Tom Bloch, and Kansas City's Mayor Quinton Lucas commemorating this day) to recognize Henry's focus on giving back to the community and his belief in the importance of entrepreneurship. In honor of this milestone, 100 teams volunteered throughout the city. His legacy of service is one we are proud to carry on.



About This Report

H&R Block's fiscal year 2023 ESG report marks the fourth annual review of our steadfast commitment to our clients, associates, communities, the environment, and corporate governance. As part of this comprehensive review, we are pleased to share our initiatives and progress across these areas. This report aligns with the Sustainability Accounting Standards Board (SASB) Professional & Commercial Services and has consideration for the Task Force on Climate-Related Financial Disclosures (TCFD) and other third-party agencies.

Fiscal year 2023: July 1, 2022 – June 30, 2023
Publish date: September 2023



Awards and Recognition

We are proud of the recognition we have received in FY23 to date from multiple organizations and in many different categories for our efforts to foster a culture of belonging, including:

-  America's most Innovative Companies 2023
-  Forbes America's Best Large Employers 2022
-  Kansas City Business Journal's Champions of Business Award
-  Forbes Best Employers for Diversity 2023
 - For the third consecutive year
-  Best Places to Work for LGBTQ Equality 2022, Human Rights Campaign Foundation's Corporate Equality Index
-  Urban Neighborhood Initiative's Champion of Hope Award
-  Top-Rated ESG Performer by Sustainalytics
-  Forbes Best Employers for New Grads 2023
-  Certified a Great Place to work
 - For the third consecutive year
-  2023 Fortune Best Workplace in Financial Services & Insurance™ List



Environmental
We care about our planet

The first step in understanding our environmental footprint is data collection. By better understanding the energy we consume, the emissions we release, and the waste we produce, we are positioning ourselves to conduct business in harmony with the environment.

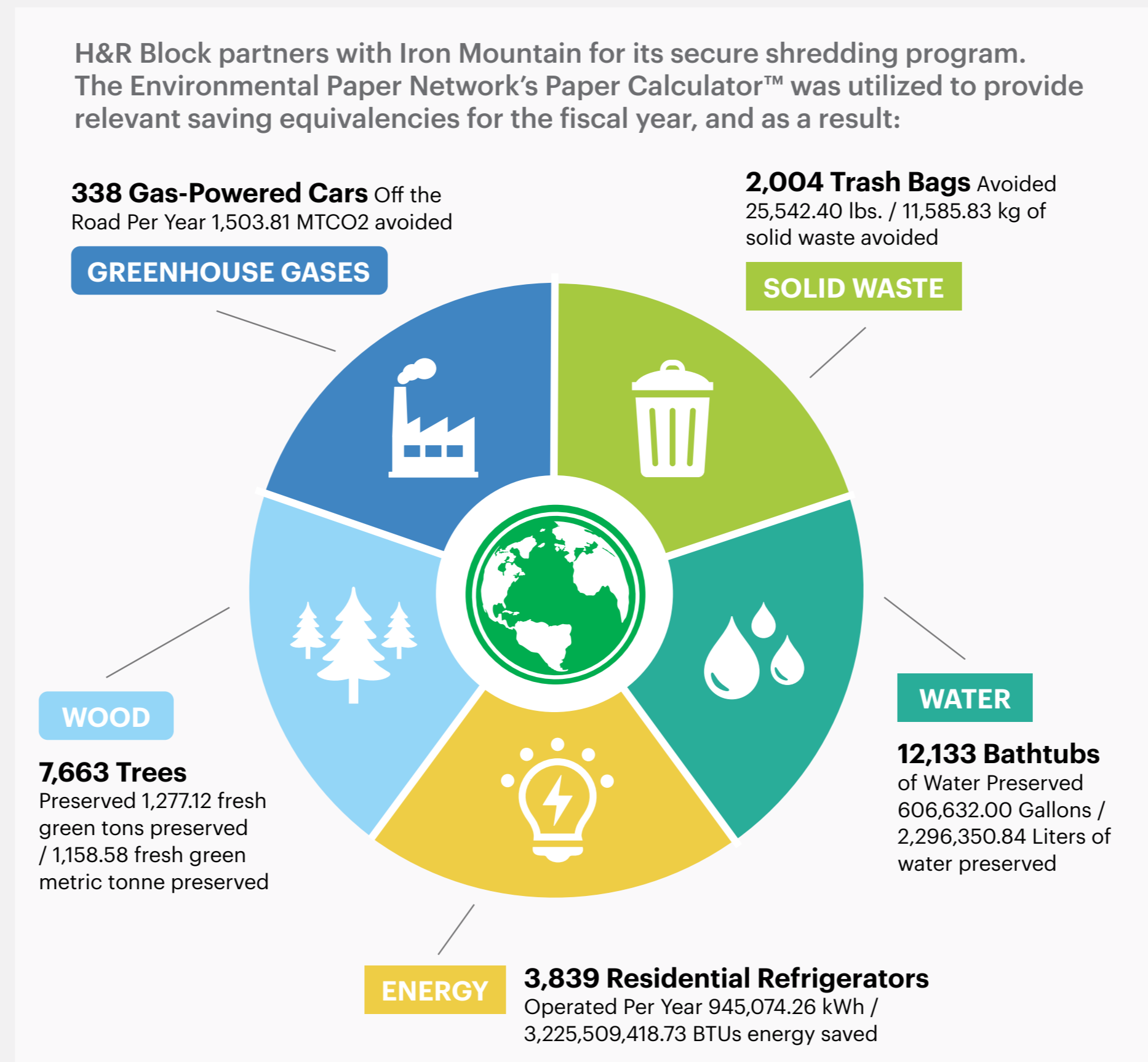
Enterprise Level Environmental Policy

H&R Block is committed 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. To date, we have implemented various programs and initiatives to reduce our environmental impact and will continue to implement environmentally responsible business practices across our operations. Examples include converting our headquarters to energy efficient LED lighting, annual estimations of our Scope One, Scope Two, and Scope Three emissions, and associate-led recycling programs. As we continue to improve our understanding of our enterprise-wide environmental impact, we are coordinating with partners and vendors to improve our energy use, waste and water management, and sharpen our estimates.

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. As we continue to improve our understanding of our enterprise-wide environmental impact, we are coordinating with partners and vendors to improve our energy use, waste and water management, and sharpen our estimates. The full policy can also be read [here](#).

Measuring our Footprint

In FY22, we developed our first GHG emissions inventory for U.S. operations. Building on that experience, in FY23, we developed a comprehensive GHG emissions inventory for our global operations to provide greater transparency on our operational impacts.



Our global energy consumption and GHG emissions have been calculated and reported in accordance with The Greenhouse Gas Protocol. We also will be submitting a response to the 2023 CDP (formerly known as the Carbon Disclosure Project) climate change questionnaire to demonstrate our commitment to disclosing our impacts accurately and transparently.

We consume energy and generate direct GHG emissions (scope 1) through stationary fuel combustion and indirect GHG emissions (scope 2) through purchased energy at our offices. We are also estimating GHG emissions associated with relevant scope 3 categories, including:

- **Category 3** – Fuel- and energy-related activities
- **Category 6** – Business travel
- **Category 13** – Downstream leased assets
- **Category 14** – Franchises

Our total FY2023 GHG emissions were: **102,953 metric tons of CO₂e**
This includes estimated amounts of:


Scope 1 22,028 metric tons of CO₂e

Scope 2¹ 50,331 metric tons of CO₂e


Scope 3 30,594 metric tons of CO₂e

To better understand and meaningfully reduce our climate impacts, we will continue improving our annual GHG accounting by tracking, measuring, and reporting relevant scope 3 categories. We also plan to use this information in our carbon reduction strategies moving forward as we continue to evaluate the feasibility of net-zero carbon operations.

¹ Location based



we believe we can materially reduce our paper usage over the next several years



committed to reducing consumption and recycling waste whenever possible



in FY23 donated more than **38,000** pieces of IT equipment



FSC certified software packaging

Other Initiatives

To date, we have implemented various programs and initiatives to reduce our environmental impact and will continue to implement environmentally responsible business practices across our operations. At our world headquarters building in Kansas City, we converted to energy efficient lighting in 2020 and have seen approximately \$30,000 in annual savings as a result. We also take pride in exemplifying our dedication to water conservation through the incorporation of electronic eye faucets at the corporate headquarters building. These sustainable infrastructure elements have successfully reduced water consumption, aligning with our environmental stewardship objectives and promoting resource efficiency.

In Canada, our team at Wave relocated its headquarters to the Waterfront Innovation Centre (WIC), a brand-new building dedicated to innovation and sustainability. The WIC was designed and built to conserve energy, reduce carbon emissions, and improve indoor air quality and thermal comfort. The building is outfitted with a photovoltaic (PV) solar array system capable of generating 5% of the building's total energy, and the roof includes both PV infrastructure and a green roof, which helps reduce the urban heat island effect, increase local biodiversity, and provide visual access to nature.

We remain committed to minimizing our environmental impact and continually seeking additional avenues to further enhance our sustainability efforts.

The Path to Print Less

At H&R Block, reducing paper consumption is one of the core ways our company can improve the way we conduct business in harmony with the environment.

In 2020, we implemented a centralized printing system at our corporate headquarters, leading to a consistent decline in paper consumption each year. This strategic move has significantly reduced our reliance on paper.

Last year, we conducted an audit of paper utilization and as a result, in FY23, we took action on our learnings with a dedicated working group focused on reducing paper consumption. After studying field operations and processes in our physical tax offices, we confirmed that we can reduce our clients' and our own carbon footprint with intentional actions. We have named this effort 'The Path to Print Less' and believe we can materially reduce our paper usage over the next several years. To achieve this goal, we are focused on three key enablers that are critical to our long-term paper reduction efforts:

- 1 Reducing print sets
- 2 Client adoption of the MyBlock app; and
- 3 Scanning documents

While this is only the beginning of our Path to Print Less journey, we feel good about where we are at and the path we are on. We will continue to evaluate how we can mitigate our paper consumption and believe this commitment aligns with our ongoing dedication to environmental sustainability as well as our digital transformation journey.

Recycling

We recognize the importance of environmental stewardship and are actively exploring the restoration and implementation of our companywide recycling program. While resource use is moderate compared to other industries, we remain committed to reducing consumption and recycling waste whenever possible. We are committed to researching and adopting sustainable practices to minimize waste,

promote recycling, and reduce our ecological footprint. We look forward to sharing more as we work towards developing and launching a comprehensive recycling program in the coming years.

IT Equipment Recycling

This year marks the third year we have partnered with Digitunity to help upcycle our computers and IT equipment. Digitunity is a national voice for digital inclusion, providing advocacy, impact, and insight; and is dedicated to strengthening organizations that are working on areas within digital inclusion including device acquisition, internet access, training and technical support. These upcycled devices are wiped, restored, and distributed to various nonprofit organizations across the U.S. This practice enables technology to be kept from landfills and provides underrepresented families, those without means to purchase computers and other technologies, with the resources and opportunities to connect to the internet and other important services.

In fiscal year 2023 we donated more than 38,000 pieces of equipment, more than doubling our donation from the previous year, through Digitunity in 34 states.

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.

As we proceed with measuring and understanding how our operations interact with the environment, we remain committed to considering how we can reduce our impact over time.



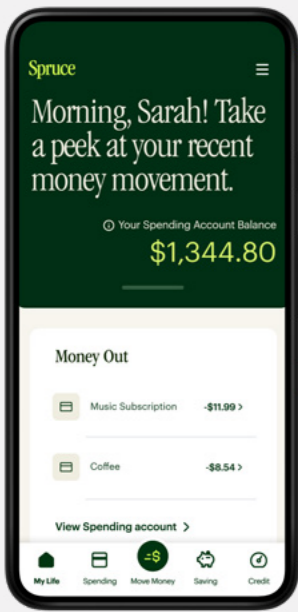
Social
We care about our people

At H&R Block’s core, we are a people business: we provide help and inspire confidence in our clients and communities everywhere. Our clients return to us year after year and across generations because our associates and franchisees take the time to understand who they are as individuals and how we can best help.

We care about our clients

SpruceSM

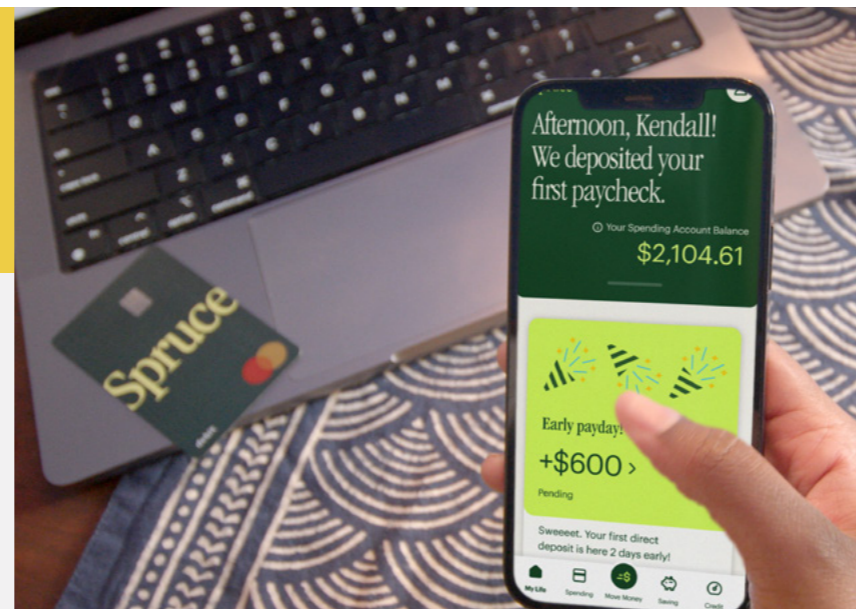
At H&R Block, our Financial Products imperative has been focused on developing new solutions and experiences that inspire confidence and help ease the financial burden of our clients. Spruce represents an important step in our transformational journey to become a year-round financial services provider.



After initially launching Spruce, our mobile banking solution, in the DIY channel in FY22, we introduced it in the Assisted channel in FY23.

Spruce came to market at a critical time when people needed financial help more than ever. It is uniquely and purposefully designed to support the nearly two thirds of Americans that are financially vulnerable and financially coping – meaning they are struggling with one or more aspects of their financial lives spanning spending, saving, borrowing, and planning. That is more than 166 million people who are not financially healthy across all incomes, geographies, ages, and dimensions of identity.

We spend millions of hours in conversations with clients every year about their financial challenges and dreams. These understandings, as well as our decades of experience in financial services, and extensive market research, revealed that there are strong needs of the financially unhealthy population that we can answer. Spruce bridges the gap in the market by providing a robust financial technology platform, alongside H&R Block’s trusted brand name, to provide a mobile banking solution to the underserved and those who need access to bank accounts in the increasingly digital world.



Feedback from users indicate that these tools give them the visibility and control that they have been missing in their financial lives.

Spruce is making an impact. It is clear the product is demonstrating our Purpose of providing help and inspiring confidence in clients and communities everywhere. Spruce has empowered clients to be better with money, grow their financial health, and build financial literacy.

- **Every Spruce user is automatically given a savings account and the balances accumulating in these savings accounts continues to grow. Users are able to customize their savings goals to save for the things they want in their lives – whether it be emergency savings, a family vacation, or a new car.**
- **This tax season, tens of thousands of users deposited over 100 million dollars of refunds to their Spruce account up to 5 days early, which is a meaningful benefit when every dollar matters. Our unique Smart Tax Refund feature enables users to pre-commit a portion of their refund into their savings goals.**
- **We also launched a feature enabling clients to easily set up direct deposit within the app with just a few clicks. Thousands of clients have engaged with the tool, and of those, more than 80% have chosen to direct deposit their entire paycheck.**
- **When it comes to spending, our budget watchlist feature utilizes flexible guardrails to help build healthy habits.**



We look forward to rolling out new features and innovations to meet our clients' needs.

Product Accessibility and Inclusive Design

On an annual basis, we conduct an audit via Level Access and work to identify, improve, and launch opportunities around our product accessibility and design. In FY23 alone, we made more than 200 accessibility improvements within our Spruce mobile banking application. These efforts resulted in enhanced color contrast compliance, improved readability, and optimization in our primary call to actions across the application to be WCAG AAA compliant, the highest possible conformance level as measured by the Web Content Accessibility Guidelines.

Our photography and illustrations are crafted to convey a strong message of inclusivity, embracing and representing people of color, LGBTQ+ families, and couples. Additionally, internally, our company Content Style Guide contains inclusive guidelines on preferred first names and pronouns, ensuring that we address our diverse client base with care, using a compassionate and respectful tone.

Note: Banking products offered by Pathward®, N.A., Member FDIC.

We care about our communities



Make Every Block Better

Our commitment is to build connections among neighbors and support small business owners from coast to coast. We remain dedicated to connecting

neighbors to each other by improving the spaces and places where they convene. We also believe supporting local communities means supporting small businesses, creating an environment where the spirit of entrepreneurship thrives.

We are proud to give back to communities across the world in many ways. With over 10,000 offices worldwide, we are able to find unique ways to give back and connect people to possibilities.



Henry and Richard Bloch began the H&R Block Foundation as a way to give back to the community that supported their business and to recognize associates for contributions to their own neighborhoods. Since its

inception, the Foundation has been committed to assisting low-income, underserved individuals in communities across the country and supporting nonprofit organizations that increase access to the arts, build stable neighborhoods, offer diverse learning opportunities, and expand access to services that respond to all individuals' physical and emotional needs. The Foundation continues to support the H&R Block culture by aligning resources and leadership to create positive social change. To learn more about The Foundation, [click here](#).



Volunteer hours

Helping others is what we do best. As part of our Block Horizons 2025 transformation journey, one of our ambitions includes Making Every Block Better by committing to 1 million volunteer hours and supporting 500,000 small business owners by 2025. We are well positioned to achieve these goals.

Since the start of Block Horizons:

- **>370,000 hours volunteered:** Our associates are the driving force behind our momentum. Through their efforts, we remain on pace to reach our goal of 1 million volunteer hours by 2025.
- **1,354 communities impacted:** We are making it easier for neighbors to connect by improving the spaces and places where neighbors come together in communities across all 50 states.
- **>1,000,000 small business owners served:** This includes small business owners reached through our Make Every Block Better programs and partnerships.



100 Volunteer Hour Club

The 100 Volunteer Hour Club recognizes and celebrates H&R Block associates, franchisees, and franchise employees who record at least 100 volunteer hours to date from the beginning of our Block Horizons journey. Achieving this milestone demonstrates how our associates are living our Purpose and working to Make Every Block Better across the country.

Convention & Town Hall Volunteer Events

Each year, we host our Annual One Team Convention and regular company-wide Town Halls to gather and foster transparent communication, engagement, and alignment with our organization and shared goals. These gatherings provide a platform for leadership to share important updates, recognize achievements, and address questions from associates, and are designed to build community and collaboration, fostering a positive and cohesive work environment. In line with our Purpose, we integrate opportunities for our teammates to give back to our clients and communities.

We are committed to strengthening the communities we serve, and this year's annual H&R Block One Team Convention brought together nearly 3,000 franchisees and associates from around the globe to give back to the Las Vegas community. Our team assembled 3,500 hygiene kits for the [Red Cross of Southern Nevada](#), and 220 duffle bags were filled with personal and comfort items for the [Nevada Partnership for Homeless Youth](#).

H&R Block's spring Town Hall event concluded with hundreds of attendees giving back to the local Kansas City community by volunteering with [Clean the World](#). Together, associates assembled 7,500 hygiene kits which were distributed to Veterans Community Project, Cross-Lines Community Outreach, and several other organizations in the area – furthering our commitment to providing help and inspiring confidence in our communities.

Partnering together

We have teamed up with organizations across the country, and in our own backyard in Kansas City to support our communities nationwide.



Habitat for Humanity (H4H)

We have invested nearly \$1,000,000 to support neighborhood revitalization projects and to fund local grant activities across 40 cities in partnership with H4H International.



Nextdoor

Together, we have worked in 30 cities across the U.S., bringing community-nominated projects to life that improve the spaces and places where neighbors connect.



Neighborhoods Rising Fund

We have helped provide 203 grants for community-driven and neighborhood-led revitalization projects and initiatives in low- to moderate-income areas throughout the Greater Kansas City region.



Urban Neighborhood Initiative (UNI)

We have partnered in hosting community-building events that provide opportunities for residents to connect, link citizens to resources, and provide home repairs within 10 historically underserved neighborhoods in the heart of Kansas City.



- Last year, UNI celebrated its 10-year anniversary with a Gala. H&R Block was the presenting sponsor for the evening's awards and helped honor several community leaders who help carry out UNI's mission. The event raised more than \$200,000 to support UNI's work in Kansas City's urban core, and H&R Block was presented with the UNI's first ever 'Champion of Hope' award.

Disaster Relief

During times of great need, we stand ready to live out our Purpose with quick and impactful responses.

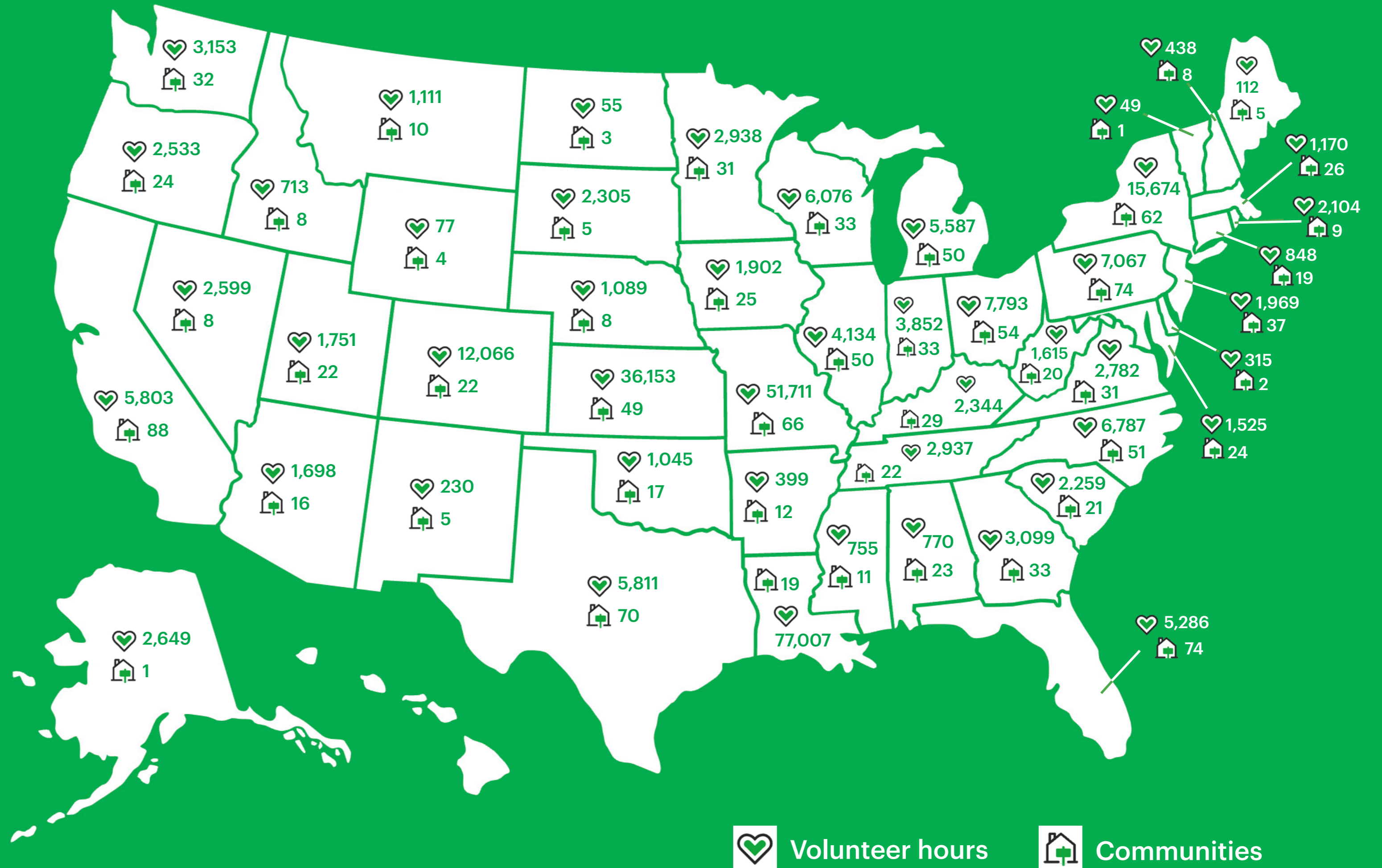
In October of 2022, Hurricane Ian made landfall in the United States, causing catastrophic damage in Florida before working its way up to South Carolina. Many people in the United States and Cuba lost their lives as a result, and many more lost their homes, with hundreds of thousands going without power for weeks. H&R Block was part of these communities with associates, franchisees, clients and community partners across the impacted geographies. In response, we donated \$50,000 to the American Red Cross, whose teams were on the ground working hard to help recover the impacted areas.

Associate Relief Fund (ARF)

The ARF provides short term financial assistance to seasonal and non-seasonal associates, franchisees, franchise employees, and international associates, in moments of personal need and empowers the Block family to help one another. Associates may apply for assistance if they have experienced financial difficulties as a result of a declared disaster or during a time of personal hardship. Now in its third year, the fund has awarded over 160 grants totaling more than \$110,000 in financial relief to our associates across the U.S., Canada, and India.

Visit the Make Every Block Better [website](#) to learn more about our partnerships nationwide designed to help connect neighbors and support small business owners, including our interactive map to see how we are helping make every block better in every state. We also invite you to visit our [News Center](#) to find out more about the ways we are making an impact in communities coast to coast.

A closer look at how far we've come.



Hometown Impact

In February of 2023, H&R Block, the H&R Block Foundation, and the Marion and Henry Bloch Family Foundation pledged a \$10 million investment towards the South Loop Link project in downtown Kansas City. This pledge marked the largest private donation to the proposed green space project that will reshape the area around where H&R Block's world headquarters is located. The 4.6-acre space will be designed as a full sensory experience for all ages with many park features including public entertainment forums, whimsical gardens, pop up markets, accessible play spaces, and year-round programming. Once completed, the South Loop Link will bridge Kansas City's central business district, the crossroads arts district, the convention center, and adjacent communities. By reconnecting a fractured city space, the Link will make Kansas City more inclusive, equitable, and vibrant while providing job opportunities and access to healthier lifestyles. A more sustainable downtown with improved air quality, reduced noise, and a commitment to prioritize pedestrians, cyclists, and multimodal transportation will be created and empowered as a result.



International Impact

Our commitment to helping communities is wide reaching. As a global company, our teams are hard at work around the world delivering our Purpose.

India

Our Blockers' Social Responsibility (BSR) group in India stands as a beacon of hope through their commitment to community outreach, educational support, and healthcare assistance; building a brighter future for all.

Community outreach

In a world where countless individuals struggle to find a place to call home, BlockShelter emerged to provide shelter and hope to those most in need. With the goal at inception to build one new house each year, the initiative is now on its sixth build in less than three years.

Educational support

Each year, our associates in India volunteer for the "Sponsor a Kid" program, an initiative designed to provide comprehensive support in the areas of tuition and admission fees, career guidance, and mentorship to underprivileged students.

This year, the H&R Block India team spread joy and excitement ahead of the first day of school for more than 500 first grade students by building and distributing laundry hampers filled with essential items. The reach of this give-back effort expanded to four different government schools and three orphanages.



Healthcare assistance

Our H&R Block India team has forged a long-term partnership with the Ahalia Eye Foundation, providing ongoing assistance to those in need across Kerala. "B The Vision" was born from the partnership that gives the gift of sight to socially and economically disadvantaged individuals by offering free cataract surgeries. Through eye test camps, H&R Block India has given over 250 people the opportunity to diagnose their eye conditions, with more than 30 beneficiaries undergoing successful cataract surgeries.

Canada

Inspired by Kansas City's celebration of Henry Bloch's 100th birthday, the H&R Block Canada team kicked off their inaugural Make Every Block Better Giving Campaign this year. In a one-month period that happens biannually, associates compete regionally for a \$5,000 charitable donation to a community organization that supports poverty reduction. In FY23, H&R Block Canada associates participated in over 200 events, volunteering nearly 2,000 hours. In addition, this past tax season, the H&R Block Canada group began a new 'Warming up the Block' program, collecting socks to donate to local shelters.

We believe communities thrive when its entrepreneurs are equipped for success and can provide valuable services that meet neighborhood needs.



Supporting Small Businesses

KC Rise Fund

To incentivize local innovation and prioritize small businesses in Kansas City, we committed a \$2 million investment over multiple years to the KCRise Fund II, a venture capital fund that invests in high growth, early-stage tech businesses. The Fund's investors include local corporations, family firms, and prominent business leaders, all committed to building the future. We have helped provide venture capital to high-growth, early-stage technology businesses that continue to solve problems in a broad range of industries.

Urban League of Greater Kansas City (ULKC)

For the past two years we have participated in a small business support program, funding microgrants for Black-owned businesses in partnership with the Urban League of Greater Kansas City. This year, we have a new cohort of Black-owned small businesses ready

to improve their finances, and we helped the ULKC launch its Make Black Businesses Better program to ensure 25 small business owners survive, thrive and continue to play a part in improving and uplifting our local economy and communities everywhere. In FY23, we distributed more than \$16,000 in microgrants to continue supporting Black small business owners. Learn more about this program [here](#).

Small Business Pride Grant Program

Last year, Block Advisors by H&R Block started a new initiative to support LGBTQ+ small business owners and elevate their stories. We awarded \$5,000 grants to 10 LGBTQ+ owned small businesses throughout the year. In addition to the grant funding, the entrepreneurs received complimentary Block Advisors small business tax preparation services, participated in a photography branding session, and had their small business featured in the Block Advisors Resource Center and on social media platforms.

Startup crawl

We support Startland as part of our commitment to building the small business ecosystem and providing resources for entrepreneurs and small business owners. In June of 2023, Block Advisors by H&R Block hosted the return of the [Startland News Startup Crawl](#) in the lobby of our world headquarters. The iconic building was one of three stops for the event, which invited more than 50 startups to showcase their organizations to over 800 attendees.

We care about our associates

At H&R Block, we foster a culture of belonging, where every voice is heard and our associates feel safe, included and inspired. We are committed to a fair and respectful workplace culture, free of discrimination, and we work to foster a Connected Culture that ensures all associates, tax pros, and franchise teams have a strong sense of Belonging across the organization.

Connected Culture is a relationship centered principle at H&R Block that puts associates and clients at the heart of our strategic focus. It creates an environment of clear accountability, partnership, and trust – all focused on common goals, allowing for accelerated business and personal progress. Relationships are at the heart of how we work with each other, our customers, and in our communities.

Equity Action

At H&R Block, we are committed to promoting equity and inclusivity in the workplace. Two years ago, we implemented our Racial Equity Action Plan and have since integrated these tenants into our regular business practices.

Last year, we doubled our recruitment outreach to historically Black colleges and universities and added language from the Creating a Respectful and Open World for Natural Hair Act of 2022 — or “CROWN Act of 2022” — into our policies. In FY23, we were pleased to have a strong presence at the National Society of Black Engineers Conference, and we are continuing to expand the actions we can take to create more diversity, inclusion, and understanding at H&R Block.

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. These assessments have shown there are no meaningful gaps in pay by race or gender.

Where there are questions about whether compensation is equitable, the company adjusts to ensure appropriate compensation for all associates. Additionally, H&R Block obtains regular legal advice with a view towards ensuring its compensation practices comply with all legal requirements.

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. In FY23, nearly half of our Board of Directors and Senior Leadership Team members were women.



We believe that every student-athlete deserves a fair shot at earning the money they deserve, and we're proud to be helping close the gender gap one athlete at a time.

A historic decision made by the NCAA in 2021 granted college athletes the ability to earn income from their Name, Image, and Likeness (NIL), something they had previously not been allowed to

do. This change opened an entirely new income bracket for young college athletes. However, while the shift towards equity seemed promising, it quickly became apparent that male college athletes were receiving significantly more sponsorship opportunities and compensation than their female counterparts. In response, H&R Block launched "A Fair Shot," committing \$1 million in sponsorships, tax services, and support to female college athletes.

Building upon the inaugural year, we expanded [A Fair Shot in 2023](#) to include 50 athletes across 13 different sports, from Division 1 to Division 3 schools, and Historically Black Colleges and Universities (HBCUs), while partnering with other industry leading brands to bring greater awareness to the importance of gender pay equity in sports. As a part of the program, we provide free tax assistance to all participants along with sponsorship dollars specifically dedicated to uplifting and encouraging women in sports.

Human Rights

We remain committed to our associates’ total well-being — physical, mental, financial, career, team, and community — and seek to uphold human rights and equal opportunity 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. Last year, we updated our Human Rights, Labor, and Business Practices Policy which can be viewed [here](#).

At H&R Block, we believe every associate deserves fair access to certain opportunities. We are committed to promoting equity through fair access to workplace resources and benefits, full participation in our organizational culture for all associates, and elimination of barriers that prevent participation in organizational work life and opportunities.

We are committed to creating a **safe and secure workplace** for all associates that is free from discrimination, which includes a zero-tolerance policy toward sexual harassment. All our associates are required to complete a training program on the prevention of sexual harassment as part of new associate orientation and on an ongoing yearly basis. It is an online, scenario based, interactive learning program that focuses on the impact of behavioral misconduct and emphasizes each associate’s responsibility for maintaining a respectful and inclusive culture in the workplace.

H&R Block does **not tolerate discrimination** based on a person’s race, color, religion, ancestry, age, sex/gender (including pregnancy, childbirth, related medical conditions and sex-based stereotypes and transgender status), sexual orientation, gender identity or expression, service in the Armed Forces, national origin, physical or mental disability, genetic information, citizenship status or any other status protected by law. As previously mentioned in this report, our associates are required to complete and pass a training program on the prevention of Discrimination in the workplace annually.

Annual Compliance Training

Enabling our talent at H&R Block includes a commitment to providing our associates with impactful and meaningful training. Within thirty days of hire, all corporate regular, seasonal, and field associates are required to take the Discrimination-Free Workplace and Workplace Harassment trainings; and review our Anti-Discrimination and Anti-Harassment Policies.

Unconscious Bias Training

As part of our ongoing efforts, we conducted an impactful Unconscious Bias training program. This initiative was rolled out to 125 influential leaders across the organization, including every member of our Senior Leadership Team. Furthermore, we extended the training opportunity to multiple departments within our organization. The Unconscious Bias training program played a vital role in helping us gain valuable insights into our individual biases and fostering open dialogue about potential barriers in the workplace. By actively listening to the voices of marginalized individuals and acknowledging privileges that exist in the workplace, we took significant steps towards creating a more inclusive environment. This training helped our associates deepen their understanding of one another and further developed a greater appreciation for the unique qualities that define each individual within our organization.

Council for Inclusive Capitalism

Last year, 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.

Belonging@Block

We continually reflect on our management approaches to improve diversity and inclusion in the workplace, including discussions with our Board of Directors, to review how we can provide a sense of belonging within the company for our associates - what we call Belonging@Block. One of the many ways we work to foster a Connected Culture across the organization for associates, tax professionals, and franchise teams is through our six Belonging Groups:



COLORS (Community Organizing for LGBTQ+ Opportunity, Resources and Support) provides an inclusive space for our LGBTQ+ community and allies while cultivating understanding within the company and taking this to the communities we serve.



The H&R Block Women's Network connects, helps, and motivates women in their pursuit of professional success and personal fulfillment.



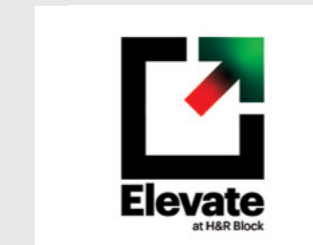
Neurodiversity at H&R Block supports neurodiversity in all forms — from neurodivergent associates, their leaders, and anyone supporting a neurodivergent loved one.



The Young Professionals Network helps younger associates become change agents and thought leaders by providing professional development, volunteer, and mentorship opportunities.



The Veterans Belonging Group provides a common and acknowledged voice for military veterans ensuring support for their concerns, issues, and inclusion.



The Elevate Belonging Group was created in July of 2022 as a resource to elevate, improve, and champion the professional development of Black associates and advance cultural awareness.

To help familiarize our associates with all we have to offer, last fall we hosted a **Belonging Splash**, a week-long celebration of the many ways each of our associates Belong at Block. Associates were able to join both in-person and virtually to learn about each Belonging Group.

In addition to Belonging Groups, our **Block Buddy** early mentorship program pairs new associates with tenured associates for guidance and assistance where needed. The program is designed to help new associates navigate their first three months on the job by matching them with a more experienced colleague. All corporate, non-seasonal associates have the option to sign up for a Block Buddy during the onboarding and orientation process.

Further demonstrating our commitment to fostering a sense of belonging, where every voice is heard and associates feel safe, included, and inspired, in April of 2023, we unveiled a **sensory room** for our associates at our corporate headquarters building. Sensory rooms are safe, quiet places that can help adults reduce stress and overstimulation and improve creativity and focus. The carefully curated room includes a calming sound machine, a tranquil environment, bean bags, sensory fidgets, and dim lighting; and provides a space for associates to check in and acknowledge their mental health and well-being throughout the workday.

“We care about our associates at Block and want to support them and their families with any needs they may have,” said Tiffany Monroe, H&R Block’s Chief People and Culture Officer. “We strive to provide programs that help create better outcomes for our associates, both mentally and physically.”

Inclusive benefits

Our total rewards programs are designed to attract and retain top talent by supporting what associates need to be their authentic selves. In 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. We also provide a working parent and pregnancy support program, to support regular associates through any path to parenthood and from any family type, through baby’s first year.

We provide **mental health benefits** that include an enhanced mental health support program for regular associates and their families, offering greater access to therapists, coaching and holistic mental health services.



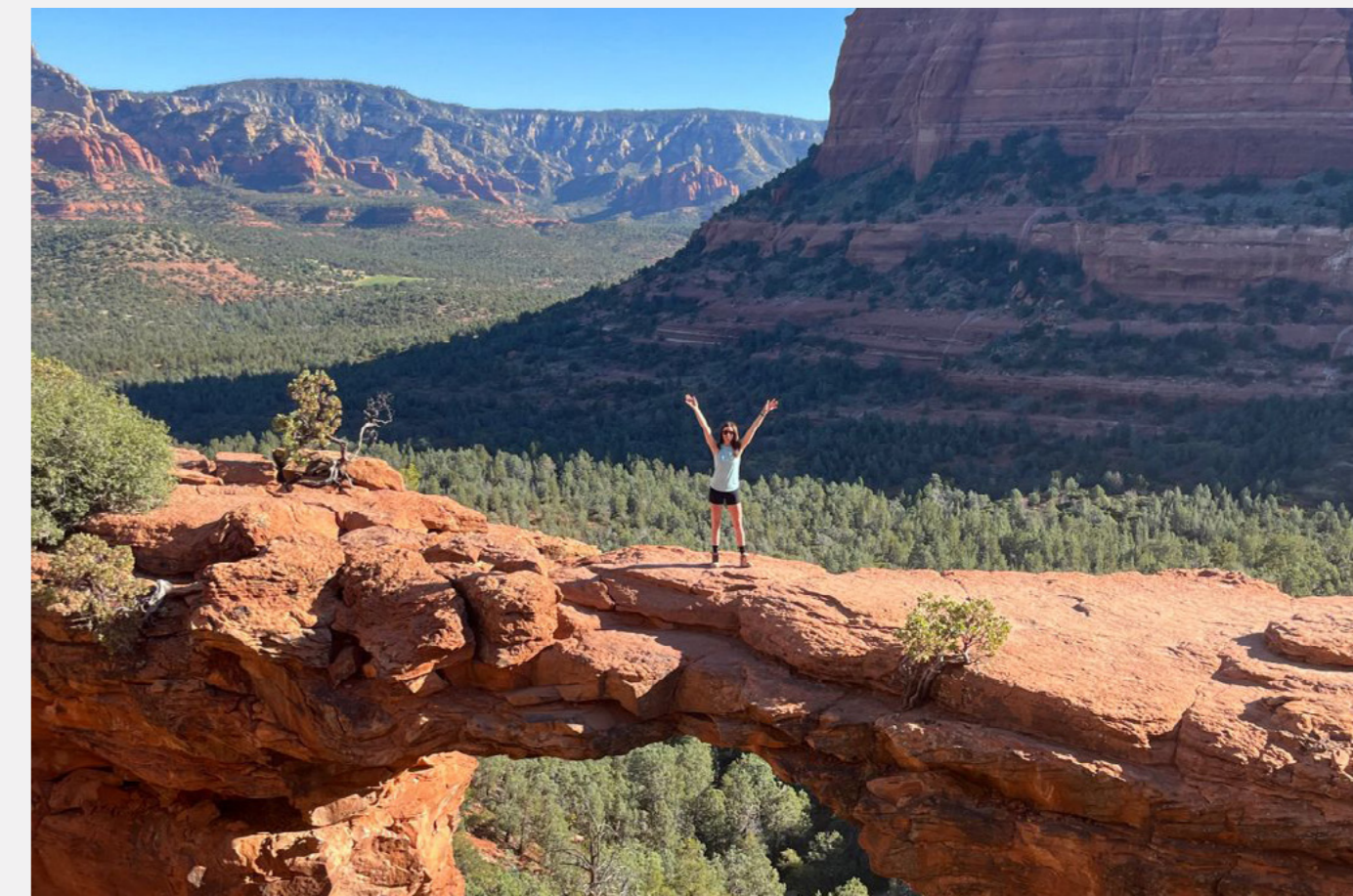
Reboot Health and Wellness Week

To thank our associates for their resiliency and hard work, each year H&R Block takes an ‘Annual Reboot’ – a paid week of time off offered during the first week of July – as an important time for our associates to disconnect, recharge, and reboot.

The Inclusive Care program helps connect LGBTQ+ community members with culturally competent providers who are more knowledgeable about their unique needs, which is available to eligible associates and dependents through our medical plans. 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.

Remote work

H&R Block embraces a flexible work environment and supports remote work arrangements for eligible associates. We highly encourage associates local to Kansas City to work from our downtown headquarters building Tuesday, Wednesday, and Thursday, but this in-person participation is not required. Every associate has the autonomy to choose the right work environment for themselves. We believe providing this level of latitude for our associates enables a highly engaged workforce who are able to operate at their best in an environment that is best for them.



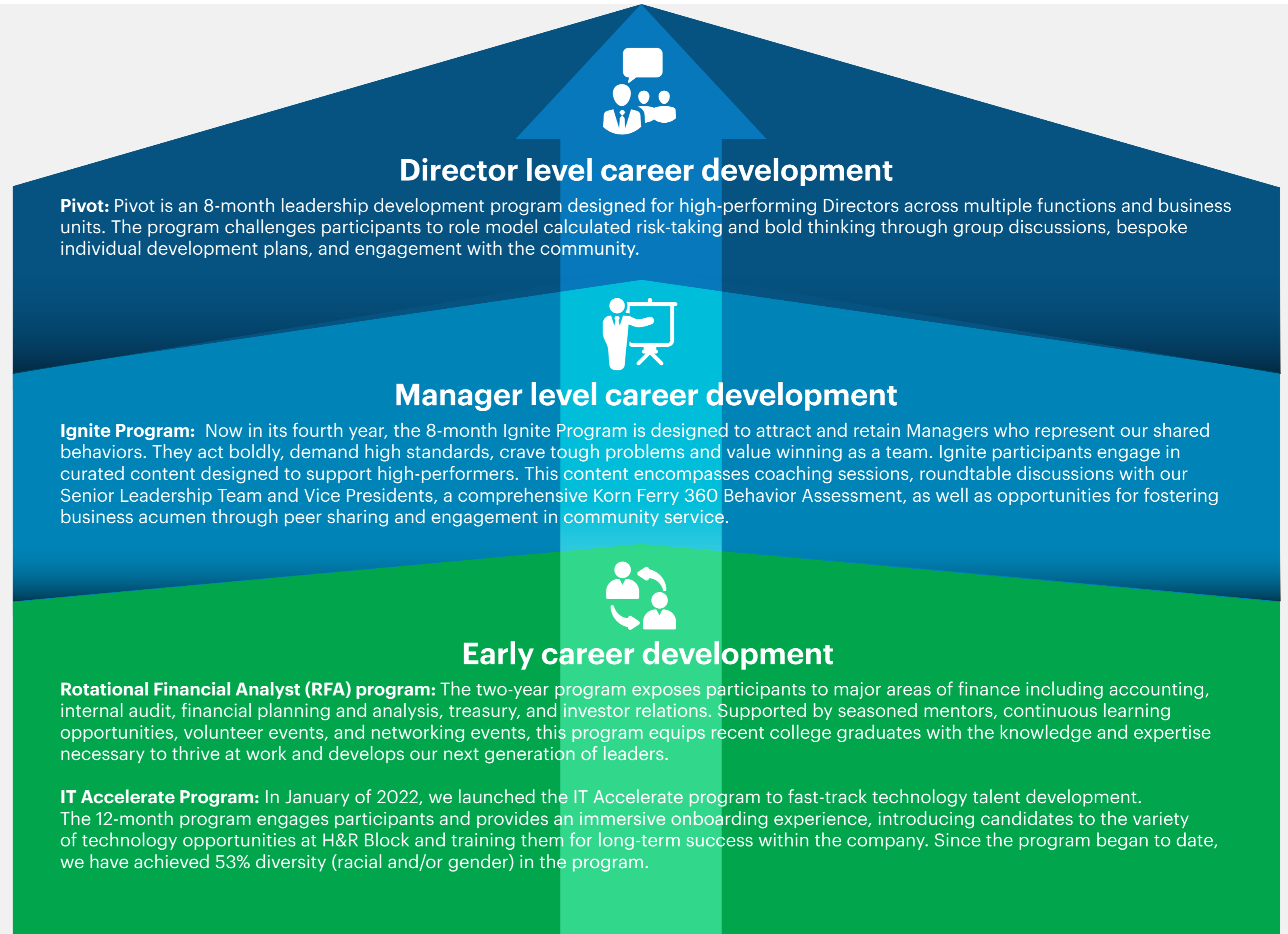
Talent development

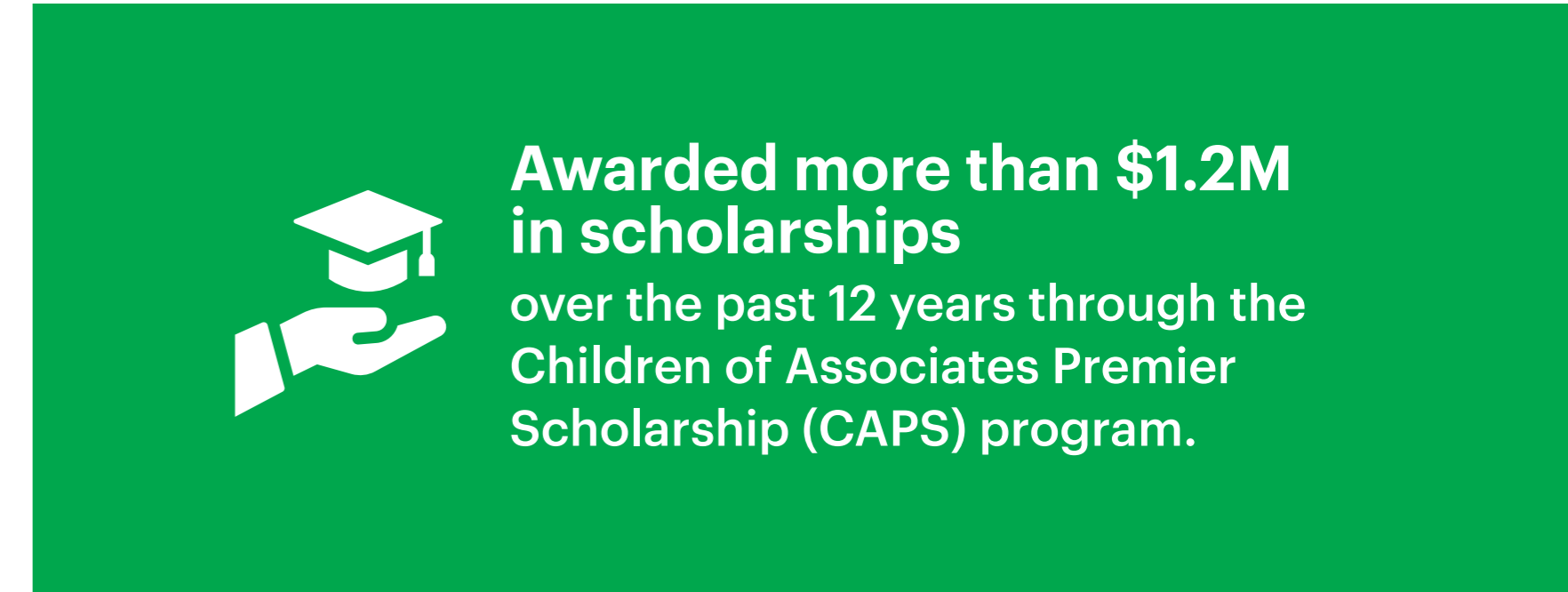
Our people are the number one enabler for living our Purpose, and we recognize the importance of attracting, developing, and retaining top talent. Our goal is to provide continuous development opportunities to our associates in order to help them grow both personally and professionally. We do this through a robust offering of programs, educational courses, and learning journeys offered virtually and in person.

LinkedIn Learning (LIL) is a user-driven learning platform with high-quality expert content on thousands of subjects that all regular and seasonal H&R Block associates have access to. Learners can set their own weekly goals for learning and share great content with others, and many courses also include the option to complete a certification.

BetterUp combines world-class coaching and science to improve well-being, adaptability, and effectiveness in associates. Through this coaching platform, we offer executive coaching for nominated vice presidents and high-performing directors, one-on-one coaching for nominated individual contributors, managers, and directors, and coaching circles for small groups of self-nominated associates, at all levels. Data analysis around the impact of coaching showed significant positive impact around associate performance, promotion, engagement, and retention.

H&R Block is dedicated to fostering the professional growth and career advancement for all associates by offering a variety of formal and informal talent and development programs. Through these initiatives, we aim to develop future leaders, further strengthen employee retention, actively cultivate new talent pools, and establish robust talent pipelines for sustained organizational success.





Performance Reviews

Regular formal performance reviews are conducted on a quarterly basis to assess performance, provide feedback, and set goals for professional growth. These reviews play a vital role in fostering a culture of continuous improvement and ensuring alignment between individual achievements and organizational objectives.

In addition, our Talent Routines include annual goal setting, quarterly, mid-year, year-end, one-on-one and skip-level conversations; career development, feedback and coaching conversations; and annual talent planning, which includes succession planning and development. Seasonal associates also participate in end-of-season performance conversations to celebrate tax season successes and discuss continued growth opportunities for potential future seasons.

Tax Professional Training

Our expertise is delivered each year through our network of more than 60,000 tax professionals. 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. In addition, we are expanding our expertise by providing support for the Enrolled Agent (EA) Exam with the IRS. In FY23, we invested in tools and resources for our associates and have enrolled more than 1,000 participants in EA study groups.

Associate Engagement Survey

At H&R Block our annual Associate Engagement Survey (AES), continues to be one of the most important ways we measure our progress in growing our Connected Culture. The AES gives associates the opportunity to confidentially communicate, challenge, and share straightforward feedback about their experiences. At H&R Block, our associates' voices, insights, and opinions matter. Each year, we ask all eligible associates for open and honest feedback through the AES and work together to take action toward improvement based on results. Regular non-seasonal associates as well as seasonal associates are eligible to participate, and geographically, associates from India, Ireland, Canada, and the U.S. take part in the survey. This year, we were pleased that our AES results remained strong. Collectively, seasonal and non-seasonal associates shared more than 90,000 comments, ideas, and suggestions.

Connected Leadership Pledge

Relationships are at the heart of how we work with each other. In FY23 more than 800 of our people leaders signed the [Connected Leadership Pledge](#), exhibiting their commitment to foster a Connected Culture within their teams. We also enhanced the way we measure our leaders' impact on their teams through our new Connected Leader Score, introduced in 2023 as a new component of our annual AES. This score ties directly to the Connected Leadership Pledge and will help leaders better understand areas of strength and opportunity.

Children of Associates Premier Scholarship

H&R Block has awarded more than \$1.2M in scholarships over the past 12 years through the Children of Associates Premier Scholarship (CAPS) program. The program seeks to reward students who give back to and build connections in their local community. In FY23, CAPS evolved, and several enhancements were made to make the program more equitable and competitive, fit with trends in higher education, and align to employee scholarship best practices.

This year, H&R Block awarded 20, \$5,000 scholarships to help children and grandchildren of associates who plan to continue their education in college or vocational school programs.

H&R Block is working with a new vendor, Scholarship America, to administer the CAPS. Scholarship America is the largest private scholarship and student support organization in the nation, administering more than 13,000 unique scholarship and education assistance programs. Scholarship America manages the application, awardee selection, and fund disbursement processes, ensuring a fair and objective evaluation and selection process.



Governance

Proactive, sound, and ethical practices

The governance section of our ESG report highlights our commitment to strong ethical practices, responsible decision-making, and effective governance structures. We strive to maintain a culture of integrity, transparency, and accountability throughout all levels of our organization.

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.

Compliance and Ethics

We are committed to being 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](#) (the Code) underscores our commitment to ethics and provides associates with consistent, company-wide guidance on expectations of ethical behavior within our operations. The Code also describes the behaviors the company expects and the resources the company has and will provide to help ensure that we conduct business honestly, ethically, and with the highest degree of integrity.

Reports may be made anonymously via the Company's ethics hotline. Additional channels for asking questions and reporting violations are identified in the Channels for Reporting Violations section of the Code. International associates may contact the Chief Ethics Officer or the applicable country-specific resource listed in the appendix included at the end of the Code. Associates can raise ethics-related concerns anonymously, and the Company is committed to non-retaliation and whistleblower protection for associates who report these types of complaints in good faith.

Engaging our Stakeholders

We regularly and openly communicate with our stakeholders through press releases, the corporate website, the annual report, the annual ESG report, SEC filings, outreach and other regular discussions. We value and regularly seek feedback from associates, investors, clients, and other key stakeholders.

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. Meet the leaders who serve on our Board [here](#).

Our Corporate Governance Guidelines provide that our Board is responsible for oversight of the company's policies, programs, and strategies regarding significant 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 annual discussions 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. View the Company's Bylaws, the Corporate Governance Guidelines, the Board of Directors Independence Standards, applicable committee charters or the H&R Block Code of Business Ethics and Conduct [here](#).

Data Security & Privacy

Given the sensitive nature of the information that our clients share, 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 regular annual training for all associates.

In addition to regular oversight through briefings to the President & CEO, the Audit Committee of H&R Block's 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.

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. 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 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](#).

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. As a result, Monarch Build LLC, a woman-owned general contractor and construction management firm, won the competitive bid to build out a coffee shop, a project at our world headquarters location. In FY23 we increased the number of diverse suppliers we worked with.

SASB Index: Below is a table that references the topics from the 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&R Block, Inc. (“H&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 & CEO, the Audit Committee of H&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"> • using a multi-layered, zero-trust principled approach to secure systems; • systematic monitoring of our sites and services to detect and respond to unauthorized activity; and • regular security audits and vulnerability assessments conducted by our dedicated internal information security team and by external third-parties. <p>H&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"> • 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; • security and business controls to appropriately limit access to and use of personal information, including adaptive and multifactor authentication; • comprehensive data protections, including encryption, to facilitate the secure storage, use, and transmission of sensitive data; • 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; • background checks on our employees, as permitted; • due diligence requirements and controls for third-parties (e.g., service providers) with access to sensitive data throughout the lifecycle of the relationship; and • a dedicated information security team that partners with all technology groups to monitor, prioritize, and remediate risks to the enterprise. <p>A description of H&R Block’s data security and privacy risks and how they are addressed are disclosed in Item 1A – Risk Factors of H&R Block’s FY23 Form 10-K on pages 14-16.</p>	20

Topic	Code	Accounting Metric	Response		Page																						
Data Security	SV-PS-230a.2	Description of policies and practices relating to collection, usage, and retention of customer information	<p>H&R Block’s policies regarding the collection, usage, and retention of customer information comply with the applicable data privacy laws in all applicable jurisdictions. We seek to be transparent when it comes to customer information and how we utilize it. For instance, we do not sell or rent our customers’ information. The privacy notices for our products and services explain our practices relating to customer information, including where applicable how we collect, use, and safeguard customer information. In addition, our privacy notices and consent forms explain the choices customers have relating to such data. All employees and contractors are required to take annual privacy/data security training.</p> <p>H&R Block’s privacy notices are publicly available online here.</p> <p>A description of H&R Block’s data security and privacy risks and how they are addressed are disclosed in Item 1A – Risk Factors of H&R Block’s FY23 Form 10-K on pages 14-16.</p>		20																						
	SV-PS-230a.3	(1) Number of data breaches, (2) percentage involving customers; confidential business information (CBI) or personally identifiable information (PII), (3) number of customers affected	<p>Given the sensitivity of this data, H&R Block will only disclose information in this area to the extent required by applicable law. Please see H&R Block’s privacy notices to learn more about our approach to customer privacy.</p> <p>H&R Block’s privacy notices are publicly available online here.</p>		20																						
Workforce Diversity & Engagement	SV-PS-330a.1	Percentage of gender and racial/ethnic group representation for (1) executive management and (2) all other employees	<table border="1"> <thead> <tr> <th data-bbox="1212 1210 1699 1286">Executive Management</th> <th data-bbox="1699 1210 3002 1286">2023</th> </tr> </thead> <tbody> <tr> <td data-bbox="1212 1286 1699 1339">Women</td> <td data-bbox="1699 1286 3002 1339">44%</td> </tr> <tr> <th data-bbox="1212 1339 1699 1391">Executive Management</th> <th data-bbox="1699 1339 3002 1391">2023</th> </tr> <tr> <td data-bbox="1212 1391 1699 1444">White</td> <td data-bbox="1699 1391 3002 1444">67%</td> </tr> <tr> <td data-bbox="1212 1444 1699 1497">Black</td> <td data-bbox="1699 1444 3002 1497">0%</td> </tr> <tr> <td data-bbox="1212 1497 1699 1549">Hispanic</td> <td data-bbox="1699 1497 3002 1549">0%</td> </tr> <tr> <td data-bbox="1212 1549 1699 1602">Asian</td> <td data-bbox="1699 1549 3002 1602">22%</td> </tr> <tr> <td data-bbox="1212 1602 1699 1654">Prefer not to Identify</td> <td data-bbox="1699 1602 3002 1654">0%</td> </tr> <tr> <td data-bbox="1212 1654 1699 1707">Native Hawaiian / Pacific Islander</td> <td data-bbox="1699 1654 3002 1707">0%</td> </tr> <tr> <td data-bbox="1212 1707 1699 1759">2 or more Races</td> <td data-bbox="1699 1707 3002 1759">11%</td> </tr> <tr> <td data-bbox="1212 1759 1699 1808">American Indian / Alaska Native</td> <td data-bbox="1699 1759 3002 1808">0%</td> </tr> </tbody> </table>	Executive Management	2023	Women	44%	Executive Management	2023	White	67%	Black	0%	Hispanic	0%	Asian	22%	Prefer not to Identify	0%	Native Hawaiian / Pacific Islander	0%	2 or more Races	11%	American Indian / Alaska Native	0%		7-9
Executive Management	2023																										
Women	44%																										
Executive Management	2023																										
White	67%																										
Black	0%																										
Hispanic	0%																										
Asian	22%																										
Prefer not to Identify	0%																										
Native Hawaiian / Pacific Islander	0%																										
2 or more Races	11%																										
American Indian / Alaska Native	0%																										

Topic	Code	Accounting Metric	Response		Page
Workforce Diversity & Engagement	SV-PS-330a.1	Percentage of gender and racial/ethnic group representation for (1) executive management and (2) all other employees	All Other Employees¹	2023	14-18
			Women	77%	
			All Other Employees¹	2023	
			White	50.7%	
			Black	18.4%	
			Hispanic	13.4%	
			Asian	7.3%	
			Prefer not to Identify	5.5%	
			Native Hawaiian / Pacific Islander	0.3%	
			2 or more Races	3.7%	
			American Indian / Alaska Native	0.7%	
	SV-PS-330a.3	Employee engagement as a percentage	Associates at H&R Block have an engagement score of 78 (on a 100-point scale), which is a one-point improvement to the prior year. Glint, our survey provider, is a part of Microsoft's Viva Employee Experience platform that provides best in industry survey solutions for over 1,000 companies.		22

¹ Includes all full-time, part-time, and seasonal associates of the company and company-owned office locations as of March 31, 2023.

Topic	Code	Accounting Metric	Response	Page
Professional Integrity	SV-PS-510a.1	Description of policies to ensure professional integrity	<p>H&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 to 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 here.</p>	20
	SV-PS-510a.2	Total amount of monetary losses as a result of legal proceedings associated with professional integrity.	In FY23, the Company did not have any material monetary losses as a result of legal proceedings associated with professional integrity that required disclosure.	N/A
Activity Metric	SV-PS-000A	Number of employees by: (1) full time and part time, (2) temporary, and (3) contract	In our Company owned offices, we had approximately 4,000 regular full-time associates as of June 30, 2023. 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, 2023, including seasonal associates, was approximately 74,400.	N/A
	SV-PS-000B	Employee hours worked, percentage billable	Not applicable to the Company’s business, as employees do not work on a billable basis.	N/A

