

## H&R Block Personalized Services Online Privacy Notice

Protecting your information is important to us. The following privacy notice sets forth our general privacy practices and principles that apply to the handling of your personal information by H&R Block Personalized Services, LLC. This privacy notice also details choices available to you regarding your personal information. In this privacy notice, references to “we,” “us,” or “our” refer to H&R Block Personalized Services, LLC.

H&R Block Personalized Services, LLC is a wholly owned, indirect subsidiary of H&R Block, Inc. If you enter into a business relationship with one of the companies under common ownership or control with us (our “Affiliate Companies”), or our Affiliate Companies’ independently-owned and operated franchisees (“H&R Block franchisees”), including through H&R Block’s nationwide network of offices, you should consult that business’s privacy notice. Additionally, if you access or interact with the following domains, it will be governed by its privacy notice:

Domain/Service	Privacy Notice
Hrblock.com	<a href="#">H&amp;R Block privacy notice</a>
Sprucemoney.com	<a href="#">Spruce privacy notice</a>
Blockadvisors.com	<a href="#">Block Advisors privacy notice</a>

If you have questions or complaints regarding our privacy practices or principles, please contact us by [clicking here](#) or calling 1-800-472-5625.

### What information do we collect?

The following provides examples of the types of information, including personal information, that we collect in a variety of contexts and how we use that information.

Context	Types of Information	Primary Purpose for Collection and Use of Information
<b>Information Related to Your Taxes</b>	You provide most of the information we collect when you consent to have your tax information (and where applicable, information about other individuals included on your tax return) disclosed to us when your taxes are prepared. Other companies may also share information with us. This information may include contact information (e.g., name, phone number, and email address), government identification numbers (e.g., EIN, Driver’s License Number, and ITIN, excluding Social Security Number), date of birth, financial information (e.g., income, revenue, assets, credits, deductions, expenses, and bank account information), payment information (e.g., checking, debit, and credit card account numbers, balances, assets, and payment history), health information (e.g., health insurance status and financial information related to payment for healthcare services), unique device identifiers, and Internet Protocol (“IP”) address (a number that is automatically assigned to a computer when the internet is used).	Pursuant to your consent or as permitted by law, we may use your information to conduct data analytics to assist an Affiliate Company in providing you personalized advice based on your tax situation and to develop and offer, products and services tailored to you or that we think may interest you.

<b>Cookies and Similar Technologies</b>	When you visit our website or interact with our emails, we may use cookies and web beacons (or clear GIFs) to automatically collect certain information and usage data. “Cookies” are small pieces of information that a website sends to a computer’s hard drive while a website is viewed. This data may include which websites you visit, what you click on, and when you performed those actions.	We have a legitimate interest in making our website operate efficiently.
<b>Website Interactions</b>	We use technology to monitor how you interact with our websites. This may include how you arrived on our website, which pages you visit, which links you click on, your mouse movements, your scrolling activity, device type, browser type, operating system, language, screen resolution, referring URL, any unique identifier we may assign when you use our services, etc.	We collect this information to understand how you interact with our websites to better improve them and our products and services, to understand your preferences and interests in order to select offerings that you might find most useful, and to otherwise customize your experience with us and better serve you. We also collect this information to help detect and prevent fraud.
<b>Web Logs</b>	We collect information, including your browser type, operating system, IP address, internet service provider, unique device ID, domain name, click-activity, referring website, and/or a date/time stamp when you use our services.	We collect this information to monitor our networks and the visitors to our websites and users of our mobile applications. Among other things, it helps us analyze trends, administer our websites and mobile applications, gather broad demographic information for aggregate use, and understand which of our services is the most popular. It also may be used for security or fraud detection purposes.

### How do we use your information?

In addition to the purposes and uses described above, we use information in the following ways:

- To identify you when you visit our websites.
- To conduct and deliver data analytics, including to develop products or services, customize your experience with or provide personalized tax advice from our Affiliate Companies.
- To communicate with you, such as to respond to and/or follow-up on your requests, inquiries, issues, or feedback.
- To detect and protect against malicious, deceptive, fraudulent, or illegal activity, including violation of our policies and terms and conditions, security incidents, and harm to the rights, property, or safety of our company and our users, employees, or others.
- To debug, identify and repair errors that impair existing intended functionality of our website.
- To comply with our legal or regulatory obligations, to establish or exercise our rights, and to defend against a legal claim.
- For internal administrative purposes, as well as to manage our relationships.
- For such other purposes as you may consent (from time to time).

As indicated below, we may share your information with Affiliate Companies, H&R Block franchisees or business partners who may use your information for the purposes described above or as otherwise as permitted by law.

### Who do we share your information with?

In addition to the specific situations discussed elsewhere in this privacy notice, we may disclose personal information in the following situations pursuant to your consent or where permitted by law:

- **Affiliate Companies and H&R Block franchisees.** We may share your information with our Affiliate Companies and H&R Block franchisees.

- **Business Partners.** We may share your information with our business partners.
- **Business Transfers.** If another company acquires, or plans to acquire, our company, business, or our assets, we will share information with that company, including at the negotiation stage.
- **Service Providers.** We may share your information with service providers. Among other things service providers may help us to administer our website, provide technical support, conduct analytics, or perform other services as permitted by law.
- **Other Disclosures without Your Consent.** We may disclose information in response to subpoenas, warrants, or court orders, or in connection with any legal process, or to comply with relevant laws. We may also share your information in order to establish or exercise our rights, to defend against a legal claim, to investigate, prevent, or take action regarding possible illegal activities, suspected fraud, safety of person or property, or a violation of our policies, or to comply with your request for the shipment of products to or the provision of services by a third-party intermediary.
- **Other Disclosures with Your Consent.** We may disclose your information to other third parties when we have your consent or direction to do so.

## Your Choices

Some jurisdictions, such as California, Colorado, Connecticut, Virginia, and/or Utah, may give you a right now, or in the future, to make the following choices regarding your personal information:

- **Access To Your Personal Information.** You may request access to your personal information or confirmation that we have personal information about you. In certain limited circumstances, you may also request to receive access to your personal information in a portable, machine-readable format.
- **Changes To Your Personal Information.** You may ask us to correct personal information we have about you that is inaccurate or incomplete. Note that we may keep historical information in our backup files as permitted by law.
- **Deletion Of Your Personal Information.** You may request that we delete your personal information. If required by law, we will grant a request to delete your personal information, but you should note that in many situations we must keep your personal information to comply with our legal obligations, resolve disputes, enforce our agreements, or for another business purposes.
- **Opt-out of Sharing for Cross-Contextual Behavioral Advertising (also referred to as Targeted Advertising).** You may request that your information not be shared for the purpose of cross-contextual behavioral advertising. You may opt-out of the use of tracking technologies on our site for the purpose of behavioral advertising by clicking “customize settings.”
- **Online Tracking.** We do not currently recognize the “Do Not Track” signal.
- **Emails.** Where permitted by law, we or our Affiliate Companies may use your information to communicate with you about products and services. If at any time you wish to limit your receipt of promotional communications, you may [click here](#), or follow the unsubscribe instructions included in each marketing communication you receive from us.

Please note, not all of the rights described above are absolute, and they do not apply in all circumstances. In some cases, we may limit or deny your request because the law permits or requires us to do so, or if we are unable to adequately verify your identity. We will not discriminate against individuals who exercise their privacy rights under applicable law.

You may submit a request to access, correct, or delete your personal information clicking [here](#) or calling 1-800-HRBLOCK. If you disagree with how we handled a request, you may appeal our decision by contacting us with the subject line “Appeal.”

We will request personal information from you, such as your name, address, state of residence, email address, phone number, last four digits of your social security number, and your birth year to verify your identity in order to process your request.

If you are a California resident, you may designate an authorized agent to submit a request on your behalf. To have an authorized agent submit a data subject access request on your behalf, we require you to submit a form that verifies your identity and that you have authorized the agent to act on your behalf.

### **How do we secure your information?**

No method of transmission over the internet, or method of electronic storage, is fully secure. While we use reasonable efforts to protect your personal information from unauthorized access, use, or disclosure, we cannot guarantee the security of your personal information in all circumstances. In the event that we are required by law to inform you of a breach to your personal information we may notify you electronically, in writing, or by telephone, if permitted to do so by law.

### **How long do we keep your information?**

We retain your personal information for only as long as necessary to fulfil the purposes outlined in this privacy notice, including for the purposes of satisfying any legal, accounting, or reporting requirements, unless a longer retention period is required or permitted by law. To determine the appropriate retention period for personal information, we consider the amount, nature, and sensitivity of the information, the potential risk of harm from unauthorized use or disclosure of the information, the purposes for which we obtained the information and whether we can achieve those purposes through other means, as well as applicable legal requirements.

### **Additional Information for California Residents**

California law requires affiliated companies that share common branding to jointly disclose the categories of personal information that they collect, share for cross-contextual behavioral advertising, sell, or disclose for a business purpose. You can find such information in the [HR Block Digital Privacy Notice](#).

### **Contact Us**

If you have questions or concerns regarding this privacy notice, or if you need to access this privacy notice in an alternative format due to having a disability, contact us by [clicking here](#), by calling 1-800-472-5625, or by mail through the mailing address below.

### **Privacy Notice Updates**

We may update this privacy notice to reflect changes to our information practices. To the extent that our privacy notice changes in a material way, the privacy notice that was in place at the time that you submitted personal information to us will generally govern that information unless we receive your consent to the new privacy notice. You can see when this privacy notice was last updated by referencing the Effective Date below.

### **Effective Date**

This privacy notice was last updated and is effective January 1, 2024.

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