



Financial Tear Sheet

H&R Block

is a global consumer tax services provider. In fiscal 2016, H&R Block:

This year, H&R Block:

- Had revenues of over \$3 billion
- Prepared 23.2 million tax returns worldwide
- Prepared approximately 1 in every 7 U.S. tax returns
- Helped clients obtain more than \$50 billion in tax refunds, credits and other government benefits
- Had a retail office within 5 miles of most Americans

Tax return preparation services are provided by professional tax preparers in approximately 12,000 company-owned and franchise retail tax offices worldwide, and through H&R Block tax software products for the DIY consumer. H&R Block also offers adjacent Tax Plus products and services.

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Stock Performance

HRB (Common Stock)

Exchange	NYSE (US Dollar)
Price	\$26.20
Change (%)	▼ 0.55 (2.06%)
Volume	393,869.00
52 Week Low	\$19.85
Market Cap	\$5,477,370,873.00
Rolling EPS	1.90
PE Ratio	13.7895
Shares Outstanding	209,059,957.00

Data as of 09/25/17 10:55 a.m. ET



Recent Headlines & Events

08/31/17 - 9:00 a.m.
[Henry W. Bloch Award for Excellence Winners Gather in Kansas City](#)

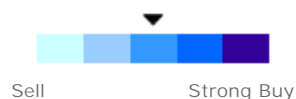
There are currently no events scheduled.

08/29/17 - 4:15 p.m.
[H&R Block Announces Fiscal 2018 First Quarter Results](#)

08/22/17 - 8:00 a.m.
[H&R Block names Jeff Jones as president and CEO](#)

Analyst Estimates / Ratings

Mean Recommendation: 3.0



Fiscal Period		Mean	High	Low	Median	# of Estimates	# Up	# Down	Mean % Change
Quarterly	Oct 17	-0.72	-0.71	-0.75	-0.72	9	5	2	0.00
Quarterly	Jan 18	-0.48	-0.37	-0.63	-0.48	9	3	4	1.18
Quarterly	Apr 18	3.84	3.95	3.77	3.84	9	4	4	-0.45
Annual	Apr 18	1.97	2.08	1.71	1.99	9	2	5	-0.70
Quarterly	Jul 18	-0.65	-0.57	-0.70	-0.69	5	3	1	-1.87
Annual	Apr 19	2.05	2.24	1.83	2.10	9	1	5	-1.09
Annual	Apr 20	2.09	2.22	1.96	2.09	2	0	2	-0.98

SEC Filings

Filing Date	Form
09/21/17	S-8
09/15/17	4
09/15/17	4
09/15/17	4

Corporate Governance

Henry Bloch	Co-Founder and Honorary Chairman of the Board
Richard Bloch	Co-Founder
Jeffrey J. Jones II	President and Chief Executive Officer
Tom Gerke	Interim President and Chief Executive Officer
Tony Bowen	Chief Financial Officer
Kathy Collins	Chief Marketing and Strategy Officer
Kip Knight	Senior Vice President, U.S. Franchise & International
Alan Lowden	Senior Vice President, Chief Information Officer
Karen Orosco	Senior Vice President, U.S. Retail Sales and Service

Ownership Summary

[Shareholders](#)

	Holders	Value (\$MM)	% O/S	Shares
Institution	657.00	6,148.10	96.0	200,662,347.00
Mutual Fund	1,080.00	3,067.71	54.8	114,613,482.00
Insider *	18.00	44.35	0.8	1,597,230.00

*Insider values reflect direct beneficial ownership.

Top Holders

	Shares Held	% O/S	Share Change	Filing Date
The Vanguard Group, Inc.	21,344,192.00	10.2	530,380.00	06/30/17
Caisse de Depot et Placement du Quebec	13,713,081.00	6.6	-4,184,900.00	06/30/17
BlackRock Institutional Trust Company, N.A.	13,660,922.00	6.5	-185,859.00	06/30/17
State Street Global Advisors (US)	10,688,029.00	5.1	19,135.00	06/30/17
First Eagle Investment Management, L.L.C.	6,144,521.00	2.9	203,186.00	06/30/17
BlackRock Investment Management (UK) Ltd.	5,996,722.00	2.9	-1,059,113.00	06/30/17
Mellon Capital Management Corporation	5,524,606.00	2.6	-1,227,470.00	06/30/17
BlackRock Financial Management, Inc.	4,976,192.00	2.4	-1,644,128.00	06/30/17
AQR Capital Management, LLC	4,181,533.00	2.0	2,303,930.00	06/30/17
Jupiter Asset Management Ltd.	3,786,600.00	1.8	776,600.00	06/30/17

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