



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	\$30.22
Change (%)	▲ 0.44 (1.48%)
Volume	2,678,444.00
52 Week Low	\$19.85
Market Cap	\$6,260,923,361.00
Rolling EPS	1.96
PE Ratio	15.4184
Shares Outstanding	207,178,139.00

Data as of 07/25/17 4:00 p.m. ET



Recent Headlines & Events

06/29/17 - 1:00 p.m.
[H&R Block Announces Renewal Process Opens Early for ITINs Expiring by Year End](#)

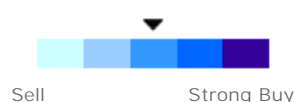
There are currently no events scheduled.

06/28/17 - 12:16 p.m.
[ETAAC Recommends Ways to Combat Tax Fraud, Improve Taxpayer Experience](#)

06/22/17 - 6:00 a.m.
[H&R Block DIY Products Surpass 100M Tax Returns Prepared](#)

Analyst Estimates / Ratings

Mean Recommendation: 3.0



Fiscal Period		Mean	High	Low	Median	# of Estimates	# Up	# Down	Mean % Change
Quarterly	Jul 17	-0.62	-0.57	-0.66	-0.62	9	0	0	0.00
Quarterly	Oct 17	-0.73	-0.70	-0.78	-0.73	9	0	0	0.00
Quarterly	Jan 18	-0.47	-0.37	-0.52	-0.49	9	0	0	0.00
Quarterly	Apr 18	3.86	4.02	3.71	3.87	9	0	0	0.00
Annual	Apr 18	1.99	2.07	1.79	2.03	9	0	0	0.00
Annual	Apr 19	2.09	2.24	1.87	2.12	9	0	0	0.00
Annual	Apr 20	2.16	2.27	2.06	2.16	2	0	0	0.00

SEC Filings

Filing Date	Form
07/21/17	NO ACT
07/19/17	4
07/17/17	4
07/06/17	4

Corporate Governance

Henry Bloch	Co-Founder and Honorary Chairman of the Board
Richard Bloch	Co-Founder
William C. Cobb	President and Chief Executive Officer
Tony Bowen	Chief Financial Officer
Kathy Collins	Chief Marketing and Strategy Officer
Tom Gerke	General Counsel and Chief Administrative 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	627.00	4,836.79	99.4	205,943,630.00
Mutual Fund	973.00	2,896.10	53.4	110,601,644.00
Insider *	18.00	40.56	0.7	1,524,741.00

*Insider values reflect direct beneficial ownership.

Top Holders

	Shares Held	% O/S	Share Change	Filing Date
The Vanguard Group, Inc.	20,813,812.00	10.1	348,330.00	03/31/17
Caisse de Depot et Placement du Quebec	17,897,981.00	8.6	-244,800.00	03/31/17
BlackRock Institutional Trust Company, N.A.	13,846,781.00	6.7	4,027,217.00	03/31/17
State Street Global Advisors (US)	10,668,894.00	5.2	636,772.00	03/31/17
BlackRock Investment Management (UK) Ltd.	7,055,835.00	3.4	406,055.00	03/31/17
Mellon Capital Management Corporation	6,752,076.00	3.3	559,958.00	03/31/17
BlackRock Financial Management, Inc.	6,620,320.00	3.2	565,186.00	03/31/17
First Eagle Investment Management, L.L.C.	5,941,335.00	2.9	191,368.00	03/31/17
Thompson, Siegel & Walmsley LLC	5,411,675.00	2.6	1,508,605.00	03/31/17
Artisan Partners Limited Partnership	4,708,203.00	2.3	-44,814.00	03/31/17

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