



H&R Block offers filers in-person, virtual and online tax filing options

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H&R Block options give consumers more ways to file than anyone else

KANSAS CITY, Mo., Jan. 03, 2019 (GLOBE NEWSWIRE) -- It's tax season year-round for H&R Block (NYSE: HRB), but January is when some consumers will start to receive their tax documents and many start preparing their tax returns. Even though there's a partial government shutdown, there's no reason for tax filers to delay preparing their tax returns. With more than 10,000 tax offices filled with tax pros ready to help clients in person and teams of tax pros at the ready to help online clients, H&R Block is ready to help consumers prepare their taxes any way they want, even during the partial government shutdown.

"Whether you want to sit with your tax pro and see the tax prep process on your own monitor, or you want to prepare your return yourself, with or without help from a tax pro, we've got your back," said Vinoo Vijay, chief marketing officer at H&R Block. "H&R Block has always gotten you your maximum refund, guaranteed, and now thanks to enhanced virtual help for online clients there truly is an H&R Block option for everyone."

Visit an office for tax help, upfront and transparent prices, and faster access to money

For the past six decades, clients wanting in-person tax help relied on H&R Block's offices and tax pros. New this year, not just to H&R Block but to the national, branded assisted tax prep industry, is [upfront, transparent pricing](#). This means in just three simple steps H&R Block clients can know the price for tax preparation before they begin.

"Our tax pros are passionate about finding ways to improve our service and they told us clients expect and deserve to know the price of tax prep services before they start," said Karen Orosco, senior vice president of H&R Block's retail business. "Our new upfront, transparent pricing this season is just one more way we show our clients that Block has your back."

In-person clients who want money faster than the IRS will deliver their refund can apply for a [Refund Advance Loan](#)* of up to \$3,000. The Refund Advance, a no-interest loan from Axos Bank™ offered Jan. 4 to Feb. 28 at participating offices, is repaid from the client's federal or state income tax refunds. If approved, clients will typically have access to money within hours of applying, even while the IRS remains partially closed.

H&R Block tax professionals will also provide W-4 planning advice when clients file their 2018 tax returns. Updating their W-4 is the best way for employees to prevent drastic, unplanned refund changes, which are increasingly likely after tax reform. Because much of the same information on a tax return is helpful in completing a W-4 form, and updating a W-4 at the start of the year stretches out the changes over a longer period, tax season is an opportune time to update a W-4.

Get upfront pricing, no office visit and a tax professional to prepare the return with virtual tax prep

If full assistance with a tax pro is what a client wants, but going to a tax office isn't, they can opt for virtual assistance with [H&R Block Tax Pro Go](#)SM – back Jan. 4 for its second season. H&R Block Tax Pro GoSM enables clients to get their taxes prepared and filed by a tax professional without leaving their home. Clients provide their information and documents online then the tax professional does the rest. They can talk to and securely message their tax pro when it is convenient for them. This tax professional will get the client their maximum tax refund, guaranteed, all starting at \$59 for a simple federal return and one state return.

Get upfront pricing, best value, more robust Free product online

This season, H&R Block online DIY tax products cost less than TurboTax – in most cases \$10 to \$13 less. In addition to lower prices, price changes will be transparent through the new Price Preview feature available Jan. 4. Clients using H&R Block online DIY products have always been able to see their base price upfront, but now they can see price changes as they add products and services.

In addition to the Deluxe, Premium and Self-Employed online products, H&R Block provides a robust Free product. H&R Block Free allows clients to file both their federal and state returns for free and covers more forms than TurboTax's free offer, including those required to claim many popular tax credits and deductions.

"Even clients who might assume their return is too complicated to be covered by a free product can use H&R Block's Free online product to claim tax benefits for student loan interest, tuition payments, daycare costs, unemployment income, Social Security payments and many other life situations – all for free," said Heather Watts, senior vice president and general manager of digital at H&R Block. "You shouldn't have to pay more just to get what's owed to you for these common tax situations."

Get as much help as needed with online filing

Just because an H&R Block client is filing online, doesn't mean they're on their own. This season, online filers have more support

options that let them decide how much or how little help they want with their tax preparation. These are the help options available to online filers:

- **DIY Online Help Center**, which is found throughout the DIY Online product, has been redesigned so it's easier for clients to find and navigate the self-help options and easier to get assistance from a seasoned tax expert when necessary.
- **Ask a Tax Pro**, which online filers can add for a fee starting Jan. 4, gives H&R Block online filers unlimited, on-demand chat sessions with a tax expert, which means they can get the help they need as they complete their returns. This includes screen-sharing and access to a member of the exclusive group of tax experts who are highly trained and average 15 years of experience.
- **Tax Pro Review**, also available Jan. 4, provides online filers who add the service the opportunity to have a highly-trained tax pro review their documents and actual tax return, sign the return, and file it on their behalf without coming into an office. Clients are paired with a tax professional who has the training and skills to handle their tax situation.

In-person and online, H&R Block has its clients' backs. For more information about tax filing options for tax season 2019, visit hrblock.com. Upfront Pricing and Refund Advance are available at participating offices.

*This is an optional tax refund-related loan from Axos BankTM, Member FDIC; it is not your tax refund. Loans are offered in amounts of \$500, \$750, \$1250 or \$3000. Approval and loan amount based on expected refund amount, ID verification, eligibility criteria, and underwriting. If approved, funds will be loaded on a prepaid card and the loan amount will be deducted from your tax refund, reducing the amount paid directly to you. Tax returns may be e-filed without applying for this loan. Fees for other optional products or product features may apply. Limited time offer. Not offered in Puerto Rico. HRB Maine License No. FRA2. OBTP#B13696 See hrblock.com/refundadvance for details. ©2018 HRB Tax Group, Inc.

About H&R Block

H&R Block, Inc. (NYSE: HRB) is a global consumer tax services provider. [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. In fiscal 2018, H&R Block had annual revenues of over \$3.1 billion with over 23 million tax returns prepared worldwide. For more information, visit the [H&R Block Newsroom](#).

About Axos Financial, Inc. and Axos Bank

Axos Financial, Inc. is the holding company for Axos Bank, a nationwide bank that provides consumer and business banking products through its low-cost distribution channels and affinity partners. With nearly \$10 billion in assets, Axos Bank provides financing for single and multifamily residential properties, small-to-medium size businesses in target sectors, and selected specialty finance receivables. Axos Financial, Inc.'s common stock is listed on the NYSE under the symbol "AX" and is a component of the Russell 2000® Index and the S&P SmallCap 600® Index. For more information about Axos Bank, please visit <https://www.axosbank.com>.

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