H&R Block's New Direct Import Feature Makes Switching from TurboTax to H&R Block DIY Online Fast and Easy

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Direct Import enables tax filers to port last year's return directly from TurboTax pulling in up to 150 fields to save time and effort

KANSAS CITY, Mo., Jan. 29, 2024 (GLOBE NEWSWIRE) -- H&R Block (NYSE: HRB) today introduced Direct Import, a fast, secure, and convenient way to simplify tax preparation for people who want to switch from TurboTax to H&R Block DIY. Today, nearly 65 million people choose to file their own taxes. This innovative integration accelerates the tax preparation process and minimizes the time spent searching for and manually inputting the information from last year needed to file their taxes.

Direct Import pulls in an individual's prior year tax return data from TurboTax directly into H&R Block DIY online products. A tax filer simply inputs the phone number associated with their TurboTax account to make the switch. H&R Block's innovative integration then leverages authenticated data retrieval to import up to 150 data fields, saving tax filers significant time and effort.

"We hear from consumers that switching is daunting because it is too difficult to move their data. The perception is that switching is too hard even when they know there are better options," said Heather Watts, SVP of Consumer Tax Products, H&R Block. "Direct Import is designed to remove the barrier to switching and give consumers complete control to choose Block for their taxes and the ease to bring their data with them."

Direct Import offers a secure and convenient way to transfer personal tax information. Direct Import is available today. It is offered across all of H&R Block's DIY online tax filing options at no extra cost when people prepare their taxes with H&R Block Free, Deluxe, Premium, or Self-Employed Online Editions.

More than five million people switched to H&R Block in 2023 for its reliable tax filing products and services, all backed by the company's 100% accuracy, maximum refund guarantees, and upfront, transparent pricing.[1] With the recent launch of AI Tax Assist, H&R Block is delivering DIY tax filers, in paid options, instant, unlimited AI tax help this season with the latest technology from Microsoft Azure OpenAI to further streamline and simplify the tax preparation process. Individuals in paid options also have access to live expert help at no additional charge.

For more information, visit HRBlock.com.

[1.] Total number of new customers using assisted or DIY tax solutions regardless of other prior tax preparer or method. See hrblock.com/guarantees for complete details.

About H&R Block

H&R Block, Inc. (NYSE: HRB) provides help and inspires confidence in its clients and communities everywhere through global **tax preparation services**, **financial products**, and **small-business solutions**. The company blends digital innovation with human expertise and care as it helps people get the best outcome at tax time and also be better with money using its mobile banking app, **Spruce**. Through **Block Advisors** and **Wave**, the company helps small-business owners thrive with year-round bookkeeping, payroll, advisory, and payment processing solutions. For more information, visit **H&R Block News** or follow **@HRBlockNews** on X.

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