



H&R Block Leverages OpenAI to Create a Force Multiplier for Its Human Expertise

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Joint initiative merges world-class tax expertise with advanced AI capabilities to enhance real-time assistance for 60,000 tax pros to support millions of taxpayers

KANSAS CITY, Mo., April 15, 2025 (GLOBE NEWSWIRE) -- H&R Block (NYSE: HRB) and OpenAI today announced a joint effort to develop a generative artificial intelligence (GenAI) solution enabling H&R Block's vast network of more than 60,000 tax professionals to deliver tailored insights, faster, to the millions of clients served each year virtually or at one of its 9,000 locations nationwide. The collaboration will combine OpenAI's advanced models with the deep expertise of H&R Block's The Tax Institute (TTI).

Comprised of tax attorneys, CPAs and enrolled agents, The Tax Institute continuously monitors and analyzes federal, state and local tax code changes to equip H&R Block tax professionals, DIY products and its AI Tax Assist solution to provide information and guidance on complicated tax situations for its more than 20 million clients. The Tax Institute provides extensive self-help resources for tax professionals to reference when serving clients, and a human-driven research service when client situations are more complicated. Leveraging GenAI improves TTI's ability to support tax professionals in real time by providing accurate, personalized answers backed by TTI's vetted content.

"Millions of hardworking taxpayers trust H&R Block to ensure the best possible outcome at tax time. By pairing OpenAI's advanced AI technology with the unparalleled tax knowledge of The Tax Institute, H&R Block's tax experts can deliver more personalized, highly nuanced guidance, streamline tax preparation, and improve the experience for millions of Americans," said Ronnie Chatterji, Chief Economist of OpenAI.

The initial phase will launch later this year, followed by a larger-scale deployment for Tax Season 2026. H&R Block and OpenAI will also collaborate to study the real-world impact and understanding of AI on professional tax preparation and assist H&R Block with building scalable solutions to address a range of AI use cases for the company.

"Whether from life changes to changing tax laws, tax preparation has become increasingly complex for taxpayers and tax professionals. We've seen the success of AI Tax Assist in building the confidence of our DIY clients and enabling them to prepare their taxes when it is most convenient," said Scott Manuel, Chief Strategy and Operations Officer at H&R Block. "We are confident the collaboration with OpenAI will have a similar impact on enhancing our tax professionals' ability to provide highly personalized, real-time support for our clients."

The initiative builds off the launch of [H&R Block's AI Tax Assist](#), a GenAI experience designed to streamline the online DIY tax preparation process. Launched before tax season 2024, AI Tax Assist combines 70 years of trusted tax expertise with the power and efficiency of artificial intelligence to provide real-time, reliable tax filing assistance for clients using H&R Block DIY products.

Editor's Note:

For media assets, visit hrblock.com/tax-center/newsroom or <https://www.hrblock.com/tax-center/media-kit/tax-season-2025/> for the Tax Season 2025 media kit.

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](#).

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