

## **H&R Block Offers Free Software to TurboTax Users**

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### **Taxpayers Who Bought TurboTax Basic or Deluxe Software Can Switch to H&R Block Deluxe + State for Free and Get a Refund Bonus**

KANSAS CITY, MO -- (Marketwired) -- 01/12/15 -- H&R Block (NYSE: HRB), the world's largest consumer tax services provider, is offering its Deluxe + State desktop software free to taxpayers who already purchased TurboTax's Basic or Deluxe software for 2014. The offer comes in the wake of a change in forms available to TurboTax Basic and Deluxe clients. Many TurboTax clients are discovering the products they've used for years will no longer support their tax needs without additional paid upgrades.

The biggest change TurboTax made in their forms coverage is no longer supporting Schedule A in their Basic product. Taxpayers who itemize deductions and use forms for mortgage interest, charitable donations and Health Savings Accounts will now have to upgrade to TurboTax Deluxe, a \$40 increase in price. However, the 30 percent of DIYers who file a Schedule A can use H&R Block Basic software, normally \$19.95, to access Schedule A forms. H&R Block Basic users will also receive a 5 percent bonus on top of a federal refund when the taxpayer puts some or all of their refund on e-gift cards from more than 40 retailers.

"If people are disappointed by their software choice this year, we encourage them to switch to H&R Block for free. Our software products offer the same tax form support and related features as last year and TurboTax users can easily import prior year data into H&R Block tax software," said Jason Houseworth, president of digital products for H&R Block.

#### ***Software users can easily "switch to Block"***

To claim the free H&R Block Deluxe + State software, taxpayers should email [SwitchToBlock@hrblock.com](mailto:SwitchToBlock@hrblock.com) and include their name, address, phone number, the type of operating system they use (Windows/Mac), and proof of purchase (a photo or scan of their store receipt or the email showing their download code). The taxpayer will then receive an email for one free download of H&R Block Deluxe + State. Taxpayers can easily import last year's tax return directly from TurboTax for free.

#### ***Deluxe clients also impacted by TurboTax decision to withhold forms***

DIYers who have small business or self-employment income and need to file a Schedule C can now switch to H&R Block's Deluxe + State software for free as they will no longer have access to Schedule C forms with TurboTax Deluxe software. H&R Block Deluxe + State also covers stocks, bonds, ESPPs and other investment income (Schedule D), which TurboTax Deluxe software no longer includes. H&R Block Deluxe + State users will receive a 10 percent refund bonus on a federal refund when the taxpayer puts some or all of their refund on e-gift cards from more than 40 retailers. All of these features, as well as five federal e-files and one state product download, are free to H&R Block Deluxe + State users.

H&R Block Basic and Deluxe clients receive the same in-person audit support and advice from a tax expert by real-time chat that all H&R Block users receive.

#### ***About H&R Block***

H&R Block, Inc. (NYSE: HRB) is the world's largest consumer tax services provider. More than 650 million tax returns have been prepared worldwide by and through H&R Block since 1955. In fiscal 2014, H&R Block had annual revenues over \$3.0 billion with 24.2 million tax returns prepared worldwide. Tax return preparation services are provided in approximately 12,000 company-owned and franchise retail tax offices worldwide by professional tax preparers, and through H&R Block Tax Software products. H&R Block Bank provides affordable financial services products. For more information, visit the H&R Block Newsroom at <http://newsroom.hrblock.com/>.

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