



SASB Index

Below is a table that references the topics from the Sustainability Accounting Standards Board’s (SASB) ‘Professional and Commercial Services’ industry standards (part of the IFRS Foundation).

“H&R Block,” the “Company,” “we,” “our” and “us” are used interchangeably to refer to H&R Block, Inc., to H&R Block, Inc. and its subsidiaries, or to H&R Block, Inc.’s operating subsidiaries, as appropriate to the context.

Topic	Code	Metric	Response
Data Security	SV-PS-230a.1	Description of approach to identifying and addressing data security risks	<p>The Company is committed to a risk-centric, layered information security approach to secure our data, systems, and services. We prioritize our data security initiatives and processes based on our assessment of known and anticipated threats to the Company’s data security. Utilizing the National Institute of Standards and Technology (NIST) Cybersecurity Framework, we strive for continuous improvement and utilize a metrics-based approach to identify and mitigate data security risks that could potentially impact our business operations or clients.</p> <p>In addition to regular oversight through briefings to the President & CEO, the Audit Committee of H&R Block’s Board of Directors (“Board”) has the primary responsibility of assisting our Board in the oversight of data security and receives regular reports on these matters from the Chief Information Officer and the Chief Information Security Officer. The full Board is also updated on a periodic basis. In addition, data security is a top priority for ongoing oversight by the Company’s Enterprise Risk Committee, and it monitors the Company’s efforts to identify, review, and remediate potential data security risks and vulnerabilities. The Enterprise Risk Committee also provides information and reports to facilitate data security briefings for the Company’s Audit Committee and full Board.</p> <p>We maintain multiple levels of protection to mitigate data security risks, and we regularly test our systems to discover and address potential vulnerabilities, including without limitation:</p> <ul style="list-style-type: none"> • using a multi-layered, Zero Trust principled approach to secure systems; • systematic monitoring of our sites and services to detect and respond to unauthorized activity; and • regular security audits and vulnerability assessments conducted by our dedicated internal information security team, our internal auditors, and by external third parties. <p>H&R Block engages in a broad range of activities to secure and protect the data that we obtain through our business operations including, but not limited to:</p> <ul style="list-style-type: none"> • continued development and enhancement of our controls, processes, and practices designed to protect our systems, computers, software, data, and networks from attack, damage, or unauthorized access; • security and business controls to appropriately limit access to and use of personal information, including adaptive and multifactor authentication; • comprehensive data protections, including encryption, to facilitate the secure storage, use, and transmission of sensitive data; • annual privacy/data security training to all employees and contractors and regular awareness and testing activities year-round regarding social engineering threats, such as phishing, for employees; • background checks on our employees, as permitted; • due diligence requirements and controls for third parties (e.g., service providers) with access to sensitive data throughout the lifecycle of the relationship; and • a dedicated global information security team that partners with all technology groups to monitor, prioritize, and remediate risks to the enterprise. <p>A description of H&R Block’s data security and privacy risks and how they are addressed are disclosed in H&R Block’s FY25 Form 10-K in Item 1A - Risk Factors on pages 8-20 and in Item 1C - Cybersecurity on pages 20-22.</p>



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Data Security	SV-PS-230a.2	Description of policies and practices relating to collection, usage, and retention of customer information	<p>H&R Block’s policies regarding the collection, usage, and retention of customer information are designed to comply with the applicable data privacy laws in all applicable jurisdictions. We seek to be transparent when it comes to customer information and how we utilize it. For instance, we do not sell or rent our customers’ information for money. The privacy notices for our products and services explain our practices relating to customer information, including where applicable how we collect, use, and safeguard customer information. In addition, our privacy notices and consent forms explain the choices customers have relating to such data. All employees and contractors are required to take annual privacy/data security training.</p> <p>H&R Block’s privacy notices are publicly available online here.</p> <p>A description of H&R Block’s data security and privacy risks and how they are addressed are disclosed in Item 1A – Risk Factors of H&R Block’s FY25 Form 10-K on pages 8-20.</p>																								
	SV-PS-230a.3	(1) Number of data breaches, (2) percentage that (a) involve customers’ confidential business information and (b) are personal data breaches, (3) number of (a) customers and (b) individuals affected	<p>Given the sensitivity of this data, H&R Block will only disclose information in this area to the extent required by applicable law. Please see H&R Block’s privacy notices to learn more about our approach to customer privacy.</p> <p>H&R Block’s privacy notices are publicly available online here.</p>																								
Workforce Diversity & Engagement	SV-PS-330a.1	Percentage of (1) gender and (2) diversity group representation for (a) executive management, (b) non-executive management, and (c) all other employees	<table border="1"> <thead> <tr> <th colspan="2" data-bbox="1392 1127 2062 1189">In Our US Operations:</th> </tr> <tr> <th data-bbox="1392 1189 2062 1251">Executive Management</th> <th data-bbox="2062 1189 3205 1251">2025</th> </tr> </thead> <tbody> <tr> <td data-bbox="1392 1251 2062 1311">Women</td> <td data-bbox="2062 1251 3205 1311">44%</td> </tr> <tr> <th data-bbox="1392 1311 2062 1373">Executive Management</th> <th data-bbox="2062 1311 3205 1373">2025</th> </tr> <tr> <td data-bbox="1392 1373 2062 1433">White</td> <td data-bbox="2062 1373 3205 1433">56%</td> </tr> <tr> <td data-bbox="1392 1433 2062 1493">Black</td> <td data-bbox="2062 1433 3205 1493">11%</td> </tr> <tr> <td data-bbox="1392 1493 2062 1553">Hispanic</td> <td data-bbox="2062 1493 3205 1553">0%</td> </tr> <tr> <td data-bbox="1392 1553 2062 1613">Asian</td> <td data-bbox="2062 1553 3205 1613">11%</td> </tr> <tr> <td data-bbox="1392 1613 2062 1673">Prefer not to Identify</td> <td data-bbox="2062 1613 3205 1673">11%</td> </tr> <tr> <td data-bbox="1392 1673 2062 1733">Native Hawaiian / Pacific Islander</td> <td data-bbox="2062 1673 3205 1733">0%</td> </tr> <tr> <td data-bbox="1392 1733 2062 1793">2 or more Races</td> <td data-bbox="2062 1733 3205 1793">11%</td> </tr> <tr> <td data-bbox="1392 1793 2062 1823">American Indian / Alaska Native</td> <td data-bbox="2062 1793 3205 1823">0%</td> </tr> </tbody> </table>	In Our US Operations:		Executive Management	2025	Women	44%	Executive Management	2025	White	56%	Black	11%	Hispanic	0%	Asian	11%	Prefer not to Identify	11%	Native Hawaiian / Pacific Islander	0%	2 or more Races	11%	American Indian / Alaska Native	0%
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Topic	Code	Metric	Response	
Workforce Diversity & Engagement	SV-PS-330a.1	Percentage of (1) gender and (2) diversity group representation for (a) executive management, (b) non-executive management, and (c) all other employees	Non-Executive Management	2025
			Women	44%
			Non-Executive Management	2025
			White	84%
			Black	5%
			Hispanic	0%
			Asian	9%
			Prefer not to Identify	0%
			Native Hawaiian / Pacific Islander	0%
			2 or more Races	2%
			American Indian / Alaska Native	0%
			All Other Employees¹	2025
			Women	75%
			All Other Employees¹	2025
			White	50%
			Black	18%
			Hispanic	0%
			Asian	8%
			Prefer not to Identify	19%
			Native Hawaiian / Pacific Islander	0%
2 or more Races	4%			
American Indian / Alaska Native	1%			

¹ Includes all full-time, part-time, and seasonal associates of the company and company-owned office locations as of March 31, 2025.

Topic	Code	Metric	Response
Workforce Diversity & Engagement	SV-PS-330a.3	Employee engagement as a percentage	Associates at H&R Block have an engagement score of 81 (on a 100-point scale), which is a four-point increase to the prior year. Glint, our survey provider, is a part of Microsoft's Viva Employee Experience platform that provides best in industry survey solutions for over 1,000 companies.
Professional Integrity	SV-PS-510a.1	Description of approach to ensuring professional integrity	<p>H&R Block maintains a Code of Business Ethics and Conduct (the "Code"), which requires all members of the Board of Directors, officers, and associates of the Company to act ethically and in accordance with the policies set forth in the Code. The Code includes guidelines relating to the ethical handling of actual or potential conflicts of interest, compliance with domestic and foreign laws, accurate financial reporting, and procedures for promoting compliance with, and reporting violations of, the Code. In support of the Code, we have established several channels for reporting potential ethics violations or similar concerns or for guidance on ethics matters, including via email, telephone, or in-person communications. All individuals have the ability to report concerns or discuss ethics-related matters anonymously through our Ethics hotline. The Company will not take adverse action against anyone who, in good faith, reports an actual or perceived violation of the Code.</p> <p>Mandatory annual training for the Code underscores our commitment to ethics and provides associates with consistent, company-wide guidance on expectations of ethical behavior within our operations.</p> <p>The Code is overseen by the Company's Chief Ethics Officer, who is appointed by the Company's Audit Committee. To help ensure the Audit Committee's effective oversight of our ethics and compliance program, the Audit Committee regularly receives reports from the Chief Ethics Officer and reviews matters related to the Company's ethics and compliance program.</p> <p>Additional details regarding our approach to ensuring professional integrity can be found in the full Code of Business Ethics and Conduct, which is available on our Corporate Governance page here.</p>
	SV-PS-510a.2	Total amount of monetary losses as a result of legal proceedings associated with professional integrity	In FY25, the Company did not have any material monetary losses as a result of legal proceedings associated with professional integrity that required disclosure.



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Topic	Code	Metric	Response
Activity Metric	SV-PS-000A	Number of employees by: (1) full time and part time, (2) temporary, and (3) contract	In our Company owned offices including international locations, we had approximately 4,300 regular full-time associates as of June 30, 2025. Our business is dependent on the availability of a seasonal workforce, including tax professionals, and our ability to hire, train, and supervise these associates. The highest number of persons we employed during the fiscal year ended June 30, 2025, including seasonal associates, was approximately 70,100.
	SV-PS-000B	Employee hours worked, percentage billable	Not applicable to the Company's business, as employees do not work on a billable basis.