

**UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
WASHINGTON, D.C. 20549
FORM 8-K**

**CURRENT REPORT
Pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934**

Date of Report (date of earliest event reported): February 1, 2024

H&R BLOCK, INC.

(Exact name of registrant as specified in charter)

Missouri
(State or other jurisdiction of
incorporation or organization)

1-06089
(Commission File Number)

44-0607856
(I.R.S. Employer
Identification No.)

One H&R Block Way, Kansas City, MO 64105

(Address of Principal Executive Offices) (Zip Code)

(816) 854-3000

(Registrant's telephone number, including area code)

Not Applicable

(Former name or former address, if changed since last report)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions (see General Instruction A.2. below):

- Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of each exchange on which registered
Common Stock, without par value	HRB	New York Stock Exchange

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter). Emerging growth company

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

Item 5.02. Departure of Directors or Certain Officers; Election of Directors; Appointment of Certain Officers; Compensatory Arrangements of Certain Officers.

(b) On February 1, 2024, Tony Bowen notified H&R Block, Inc. (the “Company”) of his intention to retire from his position as Chief Financial Officer following the Company’s fiscal year 2024 to spend more time with family and focus on personal interests. Mr. Bowen has served as the Company’s Chief Financial Officer since 2016 and has been with the Company since 2004, and the Company extends its gratitude to Mr. Bowen for his many years of service and contributions to the Company. Mr. Bowen’s decision to step down is not the result of any disagreement with the Company on any matter relating to the Company’s operations, policies, or practices.

The Company has initiated a process to identify a successor. Mr. Bowen plans to continue as Chief Financial Officer through the fiscal year, and will remain at the Company into September 2024 to help facilitate the transition of his responsibilities.

Item 7.01. Regulation FD Disclosure.

A copy of the Company’s press release regarding Mr. Bowen’s retirement is furnished as Exhibit 99.1 to this Current Report on Form 8-K.

Item 9.01. Financial Statements and Exhibits.

(d) Exhibits

Exhibit Number Description

[99.1](#) [Press Release Issued February 6, 2024](#)

104 Cover Page Interactive Data File (embedded within the Inline XBRL document)

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

H&R BLOCK, INC.

Date: February 6, 2024

By: /s/ Katharine M. Haynes

Katharine M. Haynes

Vice President and Corporate Secretary

H&R Block Chief Financial Officer Tony Bowen Announces Retirement

KANSAS CITY, Mo. – Feb. 6, 2024 – H&R Block (NYSE: HRB) today announced that Chief Financial Officer Tony Bowen has decided to retire. He is committed to a smooth transition and will remain at the company into September of 2024.

“Tony has been a tremendous partner during our transformation and instrumental in guiding the company to the strong financial position we are in today,” said Jeff Jones, President and CEO of H&R Block. “His contributions during his 20-year tenure will have a lasting impact on the company for years to come.”

As CFO, Bowen has made meaningful contributions to the company, including the rollout of upfront, transparent pricing, strong financial management leading to material earnings growth, and strategic capital allocation to shareholders. Under his leadership, the company has returned more than \$3.8 billion to shareholders through share repurchases and dividends.

“Tony has been an outstanding member of the H&R Block team for many years. From his early days in treasury to his time leading the DIY tax business and ultimately as CFO, he has played a major role in bringing the company to the position of strength we enjoy today,” said Robert Gerard, Chairman of the Board, H&R Block. “On behalf of the board and our shareholders, I want to thank him for his service to the company, our associates and clients, and the communities we serve across the country.”

Bowen has served as Chief Financial Officer since May of 2016. He began his career with H&R Block in 2004 as Senior Treasury Analyst and held various executive roles, including Vice President of Finance, General Manager of DIY tax software, and Associate Vice President of Corporate Development.

“My time at Block has been an incredible experience and I’m grateful for all I’ve learned, and the opportunities I’ve been given. It’s been an honor to be a part of this transformation journey, and I’m confident H&R Block will continue this path of success,” said Bowen.

The company will begin an external search for Bowen’s replacement. For more information about H&R Block, visit [HRBlock.com](https://www.hrblock.com).

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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](https://www.hrblock.com/news).

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