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# H&R Block Bank Privacy Statement & Other Important Information

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<b>FACTS:</b>	WHAT DOES <b>H&amp;R BLOCK BANK</b> DO WITH YOUR PERSONAL INFORMATION?
<b>Why?:</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
<b>What?:</b>	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> <li>• Social Security number and income</li> <li>• assets and account balances</li> <li>• payment history and credit history.</li> </ul>
<b>How?:</b>	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information: the reasons <b>H&amp;R Block Bank</b> chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does H&R Bank share ?	Can you limit sharing ?
<b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes -</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	Yes	No

<b>For our affiliates' everyday business purposes -</b> Information about your transactions and experiences	Yes	No
<b>For our affiliates' everyday business purposes -</b> Information about your creditworthiness	Yes	Yes
<b>For our affiliates to market to you</b>	Yes	Yes
<b>For non-affiliates to market to you</b>	Yes	Yes

### To limit our sharing:

- Call 800-472-5625 - our menu will prompt you through your choices(s) or
- View us Online: [www.hrbbank.com](http://www.hrbbank.com)

#### Please Note:

If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are no longer our customer, we continue to share your information as described in this notice. However, you can contact us at anytime to limit our sharing.

### Questions?:

- Call 800-472-5625 or go to [www.hrbbank.com](http://www.hrbbank.com)

### Who we are

Who is providing this notice? H&R Block Bank, a Federal Savings Bank

### What we do

How does H&R Block Bank protect my personal information? To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. **Additionally, we restrict associate access to your personal information**

We collect your personal information, for example, when you

How does H&R Block Bank collect my personal information?

- open an account or use your credit or debit card
- pay your bills or apply for a loan or line of credit
- make deposits or withdrawals from your account

We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.

Federal law gives you the right to limit only

Why can't I limit ALL sharing?

- sharing for affiliates' everyday business purposes- information about your creditworthiness
- affiliates from using your information to market to you
- sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

What happens when I limit sharing for an account I hold jointly with someone else?

Your choices will apply to everyone on your account.

### Definitions

Companies related by common ownership or control. They can be financial and nonfinancial companies.

Affiliates

- Our affiliates include companies with a common corporate identity or name; financial companies such as H&R Block, Inc.; and nonfinancial companies such as HRB Digital, LLC.

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

Nonaffiliates

- Nonaffiliates we share with can include mortgage companies, insurance companies, direct marketing companies, nonprofit organizations, and other banks.

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Joint marketing


- Our joint marketing partners include credit card companies, mortgage companies, and other banks.


### Other important information


You may have privacy rights under various state laws including Vermont, California, and Nevada. H&R Block Bank will comply with these laws to the extent they apply. We may telephone existing customers with offers for additional financial products. You have the right to opt-out of this contact by calling 800-472-5625 to add your name to our do-not-call/contact list. Nevada residents may also contact the Nevada Attorney General for opt out information by phone (775-684-1100); email ([helpinfo@ag.state.nv.us](mailto:helpinfo@ag.state.nv.us)); or mail (100 N Carson St., Carson City, NV 89701). We may share your personal information with offshore service providers, for the limited purpose of providing a customer service call center for certain of the bank's products and services.


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#### Tax Solutions

- File Taxes
- Free Tax Filing
- Federal Tax Return
- Free e-file
- Form 1040
- File Taxes Online
- File Taxes with Software
- File Taxes in an Office/with a Pro
- Mobile Tax Apps
- Integrated Tax Filing Solutions
- Tax Refund & Payment
- Second Look Review
- Tax Audit Support
- Year-round Taxes
- Business Tax Solutions
- Expat Tax Services
- Help Me Choose

#### Financial Services

- Manage Your Money
- Emerald Card
- Emerald Advance
- Refund Anticipation Check

#### Health Care Solutions

- Manage Your Health
- Get Helpth
- Enrollment

#### Knowledge Center

- Expert Tax Answers
- Tax Estimator
- Calculators
- Your Life & Taxes
- Tax Articles
- Blog
- Community

#### Customer Resources

- Tax & Emerald Sign In
- Banking Sign In
- Check E-File Status
- Check Refund Status
- Resend Tax Software Order Email
- Banking Forms
- Customer Help/Support
- Office Locations List
- Find an Office/Tax Pro



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