



Class Expectations

This unique blended-learning experience combines live instruction from experienced Tax Professionals with the convenience of Online learning. A component of your training will be completed at your own pace from your personal computer. Upon successful completion of this course, you will learn how to complete a basic tax return, conduct an effective tax interview, and obtain a general overview of local and state tax concepts. The breakdown of training hours is as follows:

61-62 hours of training

36-37 hours of instructor-led

25 hours of self-study

The attendance requirements state that participants cannot miss or fail to complete more than six (6) hours of any of the instructor-led or practice sessions. All 25 hours of the online learning must be completed to successfully complete the course.

**These hours will vary for H&R Block Income Tax Course offerings held in Oregon, Maryland and California based on the state requirements.

On your first day of class, you will meet your instructor and classmates. You will also receive an overview of the course. You can expect the H&R Block Income Tax Course to meet two-to-three times a week for three-hour sessions. Some courses are offered on weekends to provide additional flexibility. The duration of the course ranges from 6-12 weeks.

Course Materials

No tuition is charged for the H&R Block Income Tax Course, but you are required to purchase the electronic textbook and printed study guide ("Course Materials"), except in the state of New York and Tennessee. The total cost for the Course Materials is \$149.00 (except \$99 in Minnesota).

Course Materials costs will be waived for members of the military, wounded warriors, and military spouses who provide a valid coupon code. To obtain the coupon code please reach out to your District General Manager or Authorized School Official and show your unexpired or retired Military ID card and enter the coupon code upon registration into the H&R Block Income Tax Course. Please be advised only one coupon per person can be used and is only applicable at the time of enrollment.





REMINDER: Once classes start, the cost of the Course Materials may be non-refundable. Please see the Refund Policies for more information.

You must be at least 18 years of age at the time of enrollment to enroll in the H&R Block Income Tax Course.

System Requirements

This training is largely computer-based. You will need access to a personal computer and the internet for the self-paced portion of your training. For students attending a class in the virtual classroom, a computer and internet will be required to attend the instructor-led classes. Therefore, basic computer and typing skills are necessary to be successful. To view the H&R Block System Requirements and Downloads, first log into your Block Academy account using the email address you used to register for the course and [click here](#). If you have questions or difficulty logging in to your account, please contact 1-800-HRBLOCK. (800-472-5625).

Course Completion

Successful completion of the course does not constitute an offer or guarantee of employment with H&R Block. Interested individuals must submit an employment application and meet all applicable hiring requirements including successful completion of the H&R Block Income Tax Course with a passing score. Candidates will interview, and those who are hired will be required to complete additional paid and unpaid training

Your final grade in the H&R Block Income Tax Course is determined by the score achieved on the final test. A grade of 70% or higher is considered passing the H&R Block Income Tax Course which is required for employment consideration as an H&R Block Tax Professional. (This requirement will vary for ITC sessions held in California based on state requirements.)

H&R Block Income Tax Course (ITC) Learner Acknowledgements

By enrolling in the H&R Block Income Tax Course, you accept the terms of the 1) Competitor Exclusion, 2) Attendance, and 3) Computer Usage acknowledgments listed below. If you have questions, please contact 1-800-HRBLOCK. (800-472-5625).

1. **Competitor Exclusion Acknowledgment:** The H&R Block Income Tax Course is not intended for or open to any persons currently employed by or seeking employment with any professional tax preparation company or organization other than H&R Block. During the course, should H&R Block learn of any student's employment or intended employment with a competing professional tax preparation





company or service, H&R Block reserves the right to immediately cancel the student's enrollment. In the event of such cancellation the student will be required to return all Course Materials.

2. **ITC Attendance Policy:** To successfully complete the H&R Block Income Tax Course, the student must attend 30 or more hours of instructor-led and practice sessions. Students cannot miss more than six hours of in-class training time. If a learner misses more than six hours of in-class training time, they will not successfully complete the H&R Block Income Tax Course. They will be allowed to continue to attend the remaining in-class sessions but will not be allowed to take any remaining quizzes and tests. Because the class time is limited, it is your responsibility to complete all exercises and activities covered during any absence from class. Ask your instructor to outline the training material you missed.

3. **California Attendance Policy:** To successfully complete the California ITC, the student must attend 35 or more hours of instructor-led and practice sessions. ITC is eligible for qualifying education only. Successful students may receive up to 60 qualifying education hours. Students cannot miss or fail to complete more than eight hours of any of the instructor-led or practice sessions. All 37 hours of the Online training (30 federal and 7 California) must be completed in addition to the three-hour, California-only, instructor-led session on CA Form 540NR and Schedule CA 540, CA Military, and Ethics, in order to successfully complete the course.

4. **Computer Usage Agreement:** Information stored on H&R Block's computers and network equipment is private property, and access is monitored. The computer systems and applications used in the course are proprietary, and you may use them only for completion of the course for which you registered. Software installed on the computer may not be reproduced or distributed in any way. H&R Block will suspend or revoke the computing privileges of anyone who fails to comply with the terms of this Computer Usage Agreement. In exchange for the use of H&R Block's computers and network equipment during the H&R Block Income Tax Course, you agree to the following:
 - You will not access the internet for any purpose other than as directed by the H&R Block Income Tax Course instructor.
 - You will not attempt to gain unauthorized access to other sites or systems outside of those required to be used for class purposes.
 - You will not download or upload any software.
 - You will comply with all local, state and federal laws.
 - You will not intentionally create or distribute any viruses, worms or other forms of electronic malware.
 - You will not intentionally damage or otherwise alter the hardware, software, network equipment, or security.



5. **Notice of Right to Cancel:** A student registering for the H&R Block Income Tax Course will have the right to cancel enrollment until midnight of the third business day after receipt of notice of acceptance (unless otherwise permitted by state law). The student will receive a full refund within 10 business days of cancellation if they cancel within the three-business day period and return the unused printed study guide.
6. **Grievance Policy:** Any student complaint should first be submitted to the instructor in charge of the class. If the Instructor does not resolve the complaint, the student should contact the H&R Block District Manager or Franchisee. If the District Manager or Franchisee does not resolve the complaint, the student should contact Ryan Weber, VP Workforce Plan & Experience, HRB Tax Group, One H&R Block Way, Kansas City, MO 64105. Complaints must be in written form, signed by both the student and the school official, and marked with the date each step of the process is completed.

7. State Specific Acknowledgements and Grievance Policies:

Arizona - If the student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Arizona State Board for Private Postsecondary Education by contacting: Arizona State Board for Private Postsecondary Education, 1740 W. Adams Street, #3008 | Phoenix, AZ 85007 | Phone: (602) 542-5709 | Website: ppse.az.gov/

Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).

Arkansas - AR Dept. of Higher Education, 423 Main St., Ste. 400 | Little Rock, AR 72201 | Phone: (501) 371-2000 | Website: www.adhe.edu/private-career-education

The H&R Block Income Tax Course is licensed by the Arkansas Department of Higher Education.

California - H&R Block has been approved by the California Tax Education Council to offer this course (CTEC #1040-QE-0886), which fulfills the 60-hour "qualifying education" imposed by the State of California to become a tax preparer. A listing of additional requirements to register as a tax preparer may be obtained by contacting CTEC at P.O. Box 2890 | Sacramento, CA 95812-2890 | Toll-free Phone: (877) 850-2832 | Website: www.ctec.org





Connecticut - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Executive Director of the Connecticut Office of Higher Education at: CT Office of Higher Education, 450 Columbus Boulevard, Suite 707 | Hartford, CT 06103 | Phone: (860) 947-1816 | Fax: (860) 947-1310

Attendance: Due to the short duration of the course, the seasonality of the tax preparation field, and annual changes to tax law no provision is made for leaves of absence and partial credit for previous attendance is not granted to students who enroll in subsequent years.

Delaware - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Delaware Department of Education by contacting: DE Department of Education, 401 Federal St., Ste. 2 | Dover, DE 19901 | Phone: (302) 735-4000 | Website: www.doe.k12.de.us

Approved and regulated by the Delaware Department of Education, Dover, DE.

Hawaii - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the State of Hawaii Department of Education by contacting: HI Department of Education, Office of Curriculum and Instructional Design, 475 22nd Ave., Rm. 209 | Honolulu, HI 96816 | Phone: (808) 305-9755 | Website: www.hawaiipublicschools.org

Approved and regulated by the State of Hawaii Department of Education, Honolulu, HI.

Michigan - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Michigan Department of Licensing and Regulatory Affairs by contacting: MI Department of Licensing and Regulatory Affairs, P.O. Box 30018 | Lansing, MI 48909 | Phone: (517) 241-9221 | Website: www.michigan.gov/pss

Missouri - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Missouri Department of Higher Education to indicate his or her desire to file a complaint at: MO Department of Higher Education, 205 Jefferson St. | Jefferson City, MO 65102 | Phone: (573) 751-2361 | Fax: (573) 751-6635 | Website: dhe.mo.gov

Approved and regulated by the Missouri Department of Higher Education, Jefferson City, MO

Nevada - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint by contacting the NV Commission on Postsecondary Education, 8778 S. Maryland Pkwy, Ste. 115 | Las Vegas, NV 89123 | Phone: (702) 486-7330 | Website: cpe.state.nv.us





Licensed to operate by the NV Commission on Postsecondary Education, Las Vegas, NV.

New Hampshire - Any person (student) who has a complaint against a school who has first sought redress directly from said school through its complaint process, and said process has been completed and was found to be in favor of the school, may file a complaint with the Office of Career School Licensing at Office of Career School Licensing – New Hampshire Department of Education, 101 Pleasant Street, Concord, NH 03301 | Phone: (603) 271-6443 | Website: www.education.nh.gov/highered/career/index.htm

Refund Policy: All refunds shall be paid 30 days upon written notification from a student cancellation or withdrawal. Students receiving benefits from federal programs shall be subject to federal refund policies, rules, and regulations.

Regulated by New Hampshire Department of Education, Office of Career School Licensing, Concord, NH.

Oklahoma - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Oklahoma Board of Private Vocational Schools, 3700 N. Classen Blvd., Ste. 250 | Oklahoma City, OK 73118 | Phone: (405) 528-3370 | Website: obpvs.ok.gov

Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).

Approved and regulated by the Oklahoma Board of Private Vocation Schools, Oklahoma City, OK.

Oregon - In 1973 the Oregon legislature created the Board of Tax Service Examiners, now the Board of Tax Practitioners, to examine and license all persons in Oregon who prepare, counsel, or assist in the preparation of personal income tax returns for a fee. This legislative action was taken to insure competent and ethical tax service to Oregon citizens.

A Tax Preparer License enables a person to lawfully prepare personal income tax returns in Oregon. A tax preparer must work under the supervision of a tax consultant, a certified public accountant, a public accountant, or an attorney.





To become a Licensed Tax Preparer in Oregon you must:

Be at least 18 years of age.

Be a high school graduate or have passed an equivalency examination.

Attend and successfully pass an 80-hour course in basic personal income tax law, theory, and practice. This course must be approved by the Board of Tax Practitioners.

Any student complaint should first be submitted to the Instructor in charge of the class. If the Instructor does not resolve the complaint, the student should contact Jennifer Ryden-Moe, District Manager, H&R Block Income Tax School, 2700 NE Sandy Blvd., Portland, OR 97232.

If the District Manager does not resolve the complaint, the student should contact Ryan Weber, VP Workforce Plan and Experience, HRB Tax Group, One H&R Block Way, Kansas City, MO 64105. Complaints must be in written form, signed by both the student and the school official, and marked with the date each step of the process is completed. Students aggrieved by action of the school should attempt to resolve these problems with appropriate school officials. Should this procedure fail students may contact: Higher Education Coordinating Commission, Private Career Schools, 255 Capitol St. NE | Salem, OR 97310.

Approved and regulated by the Oregon Higher Education Coordinating Commission, Salem, OR.

South Carolina - If a student complaint is not resolved by the school the student may contact the SC Commission on Higher Education at Commission on Higher Education, 1122 Lady St., Ste. 300 | Columbia, SC 29201 | Phone: (803) 737- 2260 3245 | Website: www.che.sc.gov

Transfer Credits Policy: H&R Block makes no claim or guarantee that credit earned will transfer to another institution.

Licensed by the South Carolina Commission on Higher Education, 1122 Lady Street, Suite 300, Columbia, SC 29201; 803.737.2260. Licensure indicates only that minimum standards have been met. Licensure is not an endorsement or guarantee of quality and is not equal to or synonymous with accreditation by an accrediting agency recognized by the U.S. Department of Education.

Texas - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Texas Workforce Commission at TX Workforce Commission, Career Schools and Colleges, 101 E. 15th St., Rm. 226T | Austin, TX 78778-0001 | Phone: (512) 936-3100 | Website: <http://csc.twc.state.tx.us>





Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).

Approved and regulated by the Texas Workforce Commission, Career Schools and Colleges, Austin, TX.

Wisconsin - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the WI Dept. of Safety & Professional Safety -Educational Approval Program, 1400 E. Washington Ave., | Madison, WI 53703 | E-mail: DSPSEAP@wisconsin.gov | Website: dsps.wi.gov/pages/Home.aspx

Wyoming - WY Department of Education, 122 W. 25th St., Suite E200 | Cheyenne, WY 82002 | Phone: (307) 777-7675 | Website: www.edu.wyoming.gov

Advertising Policy: H&R Block is licensed by the Wyoming Department of Education in accordance with W.S. 21-2-401 through 21-2-407 and that neither the Department of Education nor the Wyoming State Board of Education has accredited or endorsed any course of study being offered by H&R Block.

Licensed by the State of Wyoming as a post-secondary proprietary school under W.S. 21-11-101 through 21-11-107.

8. **Acknowledgment:** I acknowledge that I have received these Acknowledgements and Refund Policies. I understand that placement in a job with H&R Block is not guaranteed or promised to students. A seat in a classroom location is subject to availability. Course locations are subject to change.

I am at least 18 years of age.

I have read and understood the provisions and legal restrictions described above governing the use of H&R Block's computers and network equipment referenced in this agreement.

I understand the use of H&R Block's computers and network equipment is a privilege, not a right. I also understand if the terms of this agreement are violated, H&R Block may deny me access to its computers and network equipment, remove me from class, and/or may refer my violation to authorities for prosecution, or the imposition of other penalties, depending on the nature of the violation.

