

## Your Privacy is Important to Us...

### What is this Privacy Assurance for?

H&R Block Canada, Inc.'s Privacy Assurance provides an overview of our privacy principles and practices and seeks your consent to the collection, use and disclosure of your personal information in connection with the preparation of your tax return or to provide other products or services that you have requested through an H&R Block location. Further details about our privacy principles and practices may be found in our Privacy Policy, copies of which are available to you at any of our locations or online at <https://www.hrblock.ca/legal/terms-conditions/privacy/>

### Protecting your privacy is important to us.

H&R Block was founded on principles of trust, integrity, and the delivery of outstanding products and services. H&R Block is committed to customer satisfaction and maintaining our customer's privacy. This is accomplished by a range of business procedures and security safeguards to ensure that your personal information is kept confidential, safe and secure and is only used in accordance with our Privacy Policy or as otherwise consented to by you.

### What we collect.

We collect personal information about you, from you, either directly or through persons or entities acting on our behalf including:

- personal information that you enter on an income tax form, including your name, address, social insurance number, and other identifying and contact information, in addition to your tax and financial information, and your e-mail address;
- information from applications, forms, surveys, and in connection with polls or contests, including your name, address and e-mail address; and
- information for billing and payment purposes, including credit or debit card information, such as card number and card expiration date.

### We collect only what is necessary.

We limit the collection of personal information to that which is necessary to fulfill the purposes identified at the time of collection. The personal information that we collect depends on the product or services that you have requested and on legal and regulatory requirements. We collect personal information about you so that we can effectively provide the services and products to you that you have requested (*including completing and filing your income tax return and/or providing you with Instant Refund™*), establish your identity, manage our operations, understand your needs and preferences, market our products and services and comply with legal and regulatory requirements.

### We respect your choice.

We may obtain your express consent in writing, through electronic means, or verbally. Your consent may also be implied by an action that you have taken, but this will only be in circumstances involving less sensitive personal information. We may also use your personal information to enable us to understand your needs and preferences and then to alert you by mail, or phone or e-mail to current and future product offerings, and to tailor marketing material to your specific needs. You can always refuse or withdraw your consent to the collection, use or disclosure of your personal information. Doing so may, in some cases, mean that we will be unable to provide you with the product or service that you have requested. If you wish to withdraw your consent to the collection, use or disclosure of your personal information (*unless it is required to provide you with the services you have requested or to provide you with necessary information relating to your accounts with us or as required or permitted by law*), please contact us at 1-800-HRBLOCK (1-800-472-5625).

### We limit disclosure.

We do not disclose your personal information to third parties except as described in this Privacy Assurance and our Privacy Policy or as permitted or required by law. Your personal information may be disclosed:

- to outside suppliers retained by us or by our parent company, HRB Tax Group, Inc. to perform certain services or functions on our behalf or at your request, including billing, processing of credit and debit card transactions, marketing, Instant Refund™ processing, Pay With Refund processing (*which requires disclosure of your personal information to DC Bank and Mastercard, as applicable*), mailing and data processing, shredding and storage, and collection or research services. We select our outside suppliers carefully and insist that they have privacy and security standards that meet our strict requirements. We provide to these suppliers only the personal information required for them to perform the services or functions for which they have been engaged. We require them to retain any personal information in strictest confidence and we restrict their use of your personal information to what is necessary to act on our behalf or to provide services at your request;
- to HRB Tax Group, Inc., H&R Block Management, LLC and H&R Block Canada Financial Services, Inc. to deliver or provide a product or service that you have requested, including Instant Refund™ or to HRB Tax Group, Inc. to offer you products and services which may be of interest to you (*though you may, of course, choose not to receive these materials, as noted above*);

- to our franchisees, where you have requested services in an area serviced by an H&R Block franchise; and
- in the event we enter into or contemplate entering into a business transaction.

Please note that personal information disclosed to HRB Tax Group, Inc. will be securely used or stored in the United States and will, in addition to Canadian laws, also be subject to the laws of the United States. In some cases, outside suppliers that we retain to perform services or functions on our behalf may be located outside Canada. Accordingly, personal information provided to these companies for storage or processing will be located outside Canada, and therefore, in addition to Canadian laws, also be subject to the laws of those countries. For information regarding HRB Tax Group, Inc.'s privacy policies and practices, please visit online at <https://www.hrblock.com/universal/digital-online-mobile-privacy-principles.html>.

**We protect your information.**

We protect personal information by security safeguards appropriate to the sensitivity of the information. We restrict internal physical and electronic access to personal information to those employees who need to access it in order to serve you. We also maintain policies and procedures designed to restrict access (*by external parties*) to your personal information in several ways. For both internal and external parties, access controls include programs and specifications for physical security, records retention and disposal, computer and communication security measures reflected in system design, password protection, data management practices, and other measures to restrict access to the information we hold in physical and electronic forms.

**We only retain your information for as long as necessary or required.**

We only retain personal information for as long as necessary, as needed for the purposes for which it was collected, or as required by law. Personal information that is no longer necessary or required will be destroyed, erased or made anonymous. It is important that the personal information we have is accurate, complete and up to date. To this end, you are encouraged to inform us when there are any changes to your information.

You may also, at any time, contact our Chief Privacy Officer to request access to your personal information, verify its accuracy and, if required, correct it.

The contact information for our Chief Privacy Officer is as follows:

Chief Privacy Officer  
 H&R Block Canada, Inc.  
 2600, 700 – 2 Street SW Calgary, AB T2P 2W2  
 By phone: 1-800-HR-BLOCK  
 By e-mail: [privacy@hrblock.ca](mailto:privacy@hrblock.ca)

In addition, as noted above, you can refuse to provide personal information to us and you may also at any time, on reasonable notice to us, in person or via telephone or email, withdraw your consent to the collection, use or disclosure of any of your personal information, unless it is required to provide you with the services or products you have requested or to provide you with necessary information relating to your accounts with us or as required by law.

If you have any questions about this Privacy Assurance, our Privacy Policy, or have a complaint or concerns, please contact our Chief Privacy Officer. H&R Block will promptly investigate all complaints and if found justified, will take appropriate measures including amending its policies and practices.

**We would like to contact you via email.**

To improve our communications and customer service we would like to correspond with you via email. In order to comply with Canadian legislation relating to commercial electronic messages, we are seeking your consent to communicate with you via electronic messages, including email, related to your client relationship with H&R Block including appointment scheduling and customer service, H&R Block product offerings, tax filing information and promotional materials. You may choose not to receive these communications at any time by emailing us at [unsubscribe@hrblock.ca](mailto:unsubscribe@hrblock.ca).

I consent to receiving electronic messages from H&R Block Canada, Inc., as set out above.

You can withdraw your consent at any time.

By signing this form below, you acknowledge that you have received, reviewed and agree with the terms of H&R Block's Privacy Assurance and Privacy Policy and consent to collection, use or disclosure of your personal information for the purposes and in the manner described herein.

Dated \_\_\_\_\_, 20 \_\_\_\_\_

Name \_\_\_\_\_ Signature \_\_\_\_\_  
 (Please print first & last name)