

H&R Block, Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

H&R Block, Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between H&R Block, Inc. and its competitors. This provides our Clients with a clear understanding of H&R Block, Inc. position in the [Diversified Services](#) Industry.

The report contains detailed information about H&R Block, Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for H&R Block, Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The H&R Block, Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes H&R Block, Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of H&R Block, Inc. business.

About H&R Block, Inc.

H&R Block, Inc., through its subsidiaries, provides tax, banking and business, and consulting services.

Segments

The company operates in two segments, Tax Services and Business Services.

TAX SERVICES

The Tax Services segment provides income tax return preparation, electronic filing, and other services and products related to income tax return preparation to the general public primarily in the United States, and also in Canada and Australia. This segment also offers the H&R Block Prepaid Emerald MasterCard and Emerald Advance lines of credit through H&R Block Bank (HRB Bank), along with other retail banking services. HRB Bank also offers traditional banking services, including checking and savings accounts, individual retirement accounts and certificates of deposit.

Services and Products

The company, in addition to its retail offices, offers various digital tax preparation alternatives. It also offers clients various options for receiving their income tax refund, including a check directly from the Internal Revenue Service (IRS), an electronic deposit directly to their bank account, a prepaid debit card, a refund anticipation checks (RAC), or a refund anticipation loans (RAL).

Software Products: The company develops and markets H&R Block At Home income tax preparation software. H&R Block At Home offers a step-by-step tax preparation interview, data imports from money management software, and tax preparation software, calculations, completion of the appropriate tax forms, error checking, and electronic filing. The company's software products may be purchased through third-party retail stores, direct mail or online.

Online Tax Preparation: The company offers a range of online tax services, from tax advice to professional and do-it-yourself tax return preparation and electronic filing, through its Web site at www.hrblock.com. This Web site allows clients to prepare their federal and state income tax returns using the H&R Block At Home Online Tax Program, access tax tips, advice and tax-related news, and use calculators for tax planning.

RALs: RALs are offered to the U.S. clients by a designated bank primarily through a contractual relationship with HSBC Holdings plc (HSBC). The company simultaneously transmits the income tax return information to the IRS and the lending bank.

RACs: Refund Anticipation Checks are offered to the U.S. clients who would like to either: receive their refund faster and do not have a bank account for the IRS to direct deposit their refund; have their tax preparation fees paid directly out of their refund; or receive their refund faster but do not qualify for a RAL under the existing credit criteria. A RAC is not a loan and is provided through a contractual relationship with HSBC.

Peace of Mind (POM) Guarantee: The POM guarantee is offered to the U.S. clients, in addition to its standard guarantee.

Emerald Advance Lines of Credit: Emerald Advance lines of credit are offered to clients in tax offices. These lines of credit are offered by HRB Bank.

H&R Block Prepaid Emerald Mastercard: The H&R Block Prepaid Emerald MasterCard allows a client to receive a tax refund from the IRS directly on a prepaid debit card, or to direct RAL or RAC proceeds to the card to avoid high-cost check-cashing fees. The

card can be used for everyday purchases, bill payments, and ATM withdrawals anywhere MasterCard is accepted. Additional funds can be added to the card account year-round through direct deposit or at participating retail locations. The H&R Block Prepaid Emerald MasterCard is issued by HRB Bank.

Tax Return Preparation Courses: The company offers income tax return preparation courses to the public, which teach students how to prepare income tax returns and provides the company with a source of trained tax professionals.

CashBack Program: The company offers a refund discount (CashBack) program to its customers in Canada.

BUSINESS SERVICES

The Business Services segment offers tax and consulting services, wealth management, and capital markets services to middle-market companies. This segment consists primarily of RSM McGladrey, Inc (RSM), which provides tax and consulting services to mid-sized businesses in 88 cities and 26 states and offers services in 20 U.S. markets.

RSM and McGladrey & Pullen LLP (M&P), an independent registered public accounting firm, collaborate to provide tax and consulting services to clients under an alternative practice structure (APS). Through the APS, RSM and M&P offer clients a range of attest and non-attest services in compliance with applicable accountancy regulations.

History

H&R Block, Inc. was founded in 1946.

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

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ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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