Portfolio 1

## Heading 2 is used throughout this document to highlight titles for pages

## and important information on each page.

This workforce solution was funded by a grant awarded by the U.S Department of Labor’s Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

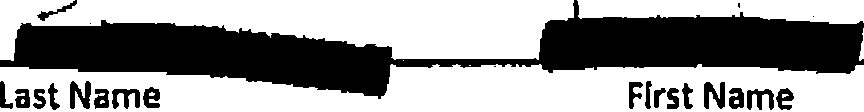
https://i.creativecommons.org/l/by/3.0/88x31.png This work is licensed under the Creative Commons Attribution 4.0 International License. It is attributed to Ohio TechNet. To view a copy of this license, visit <http://creativecommons.org/licenses/by/4.0/>.

## Credit for Prior Learning and Work Experience

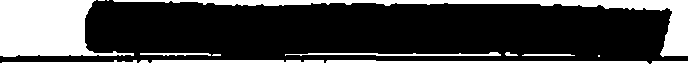
*Submit this form, with receipt if applicable, to The Gotewoy for review.*

......\_

Student ID



Middle Name

 o Landllne Mobile



Program or Study Catalog Vear Phone Number

I am requestlns credit eguivalencv for training certJfjcation(s).

*I understand the steps of this process to be:*

o This form and copies or certifications will be forwarded to the appropriate academic and records staff for evaluation.

* I will be notified or the credit evaluatlon outcome via COTC email.
* There Is **no fee** required for the certification evaluation for course equlvalency.

D Copy or my training certlflcation(s) Is attached. Thereare\_ total to be reviewed.

* I am requesting credit equlvalency for the following COTC course(s):-----------------

## X 1 am requesting credit equivalency for work experience relevant to my plan of study.

*I understand this process to be:*

### X An academic offlclal will request supporting documentation (samples or work, etc.) to assist In making a preliminary determination or potential credit equivalency. I will be notified of preliminary determination by an academic official.

### X I will retrieve original form from The Gateway and take to Fees and Deposits (Hopewell Hall) to be assessed the $75

### **evaluation fee per course.** Fees can be paid on the extended campuses by visiting The Gateway.

### X I will return the receipt and orlglnal form to The Gateway to be forwarded to Academic Affairs.

### X My work experience evaluation for credit will be assigned to a faculty member who may contact me for additional follow- up and supporting documentation.

o Upon receipt or all necessary documentation, I will be notified or the work experience evaluation outcome via COTC email.

### X Copy of my current resume Is attached.

### X Iam requesting credit equlvalency for the following COTC course(s):

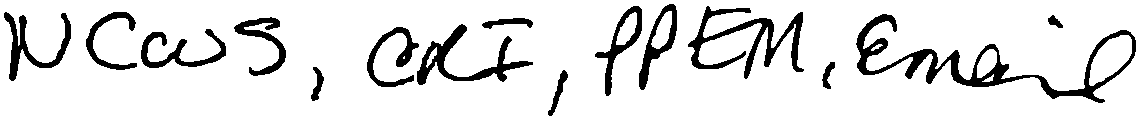
### X The $75 course evaluation fee has been paid

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Student Signature / / Date

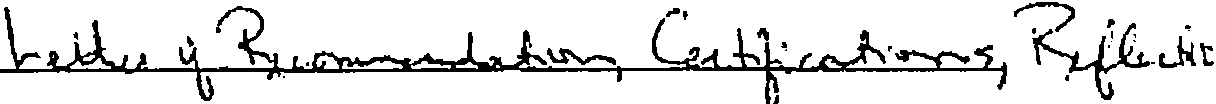
.. *Gatewaysta ake a copy of this form for the student to reference /or the next steps In their process.* .\_

Revised 10/17/16

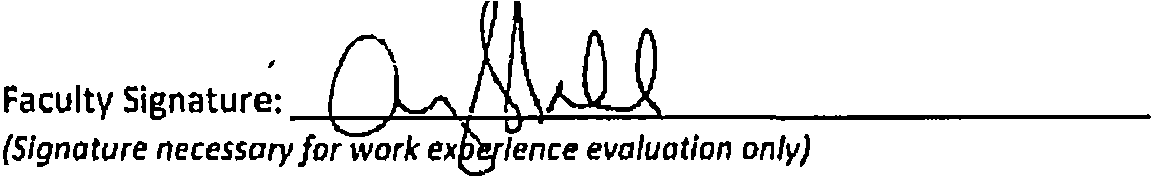
Evaluation Process:

Types of supporting documentation received:

<"I

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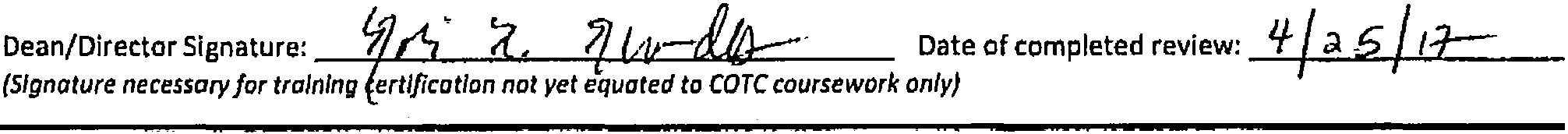
Date *all necessary* supporting do umentatlon was received: \_



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Date of completed review: \_4....,/\_z\_o........1,/\_:,..

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**Awarding Credit:**

## Course equivalencies awarded:

## ACCT-260 \_

Dean/Director Signature:

*dond*

Date:

**For office use**

**Gateway Use** Only: CRI Code RGCREDT added with status of "Not Reviewed" D

**P,o,e,,edby:**

Date:

Revised 10/17/16

## RESUME—page 1

**CAREER OBJECTIVE:**

Resume Headline: Economist- Business Management, Marketing, and Tax Specialist

**EXPERIENCE:**

**12/2014** - **Present, HR Block, Lancaster, Ohio Tax Associate,**

Preparing Federal and State Income Tax Returns for HR Block Clients and Member of HR Block Marketing Team.

**11/2002** - **8/2010** Dunkin's **Diamonds Lancaster, Ohio**

**General Manager**

Sales-General Manager Customer service, Worked with vendors, Supply, Merchandising, Worked with staff, Training, Business planning and new strategies in sales, and financial analysis.

**6/1995** • **B/2000 Government of**

**Ukraine Tax Dept.**

**Odessa, Odessa Oblast**

**{State), Ukraine**

**Business and Tax Advisor**

Business Tax Law Advisor and Auditor. Duties included TV Programs Newspaper and Magazine Articles, Workshops, Consulting Service, and Audit.

**EDUCATION:**

**5/2012** - **Present COTC, Newark Newark, OH Campus**

Business Management and Accounting Technology

**09/2014-12/2014 HR Block Tax Course Lancaster, Ohio**

Income Tax Return Preparation and Filing

**SKILLS:**

**Skill Name** Economics Accounting

Business Management

**Skill Level**

Expert

Current Student and a Tax Associate Expert

## RESUME—page 2

LANGUAGES:

**Language** English Russian Ukrainian

**Proficiency level**

Advanced Fluent Fluent

**CURRENT CAREER LEVEL:**

**WORK STATUS:**

Manager (Manager/Supervisor of Staff)

Available

**Target Job:**

**Target Company:**

**Target Job Title:**

**Alternate Target Job Title: Desired Job Type:**

**Desired Status:**

**Business and Industry**

**Occupation:**

Accounting, Tax Specialist, and Management Sales

Employee Full-Time

Accounting, Business Management, Consulting Services,

Government and Military Business Services, Other

Accounting,

Business Management,

Tax Consulting and Preparation, Business Analysis/Research, Business/Strategic Planning, Customs/Immigration

## Course Syllabus for Accounting Technology ACCT 260—page 1

Central Ohio Technical College

Division of Business, Engineering & Information Technologies Accounting Technology

**Standardized Course Syllabus**

Course Title: Accounting Field Experience Course Number: ACCT-2.60

Course Credit Hrs: Course Contact Hrs:

.5 credit hours

o hours of lecture

0 hours of college lab 6 contact hours

Course Prerequisite: C grade (2.00) or better in ACCT-241 and ACCT-232. The field experience requires that a student will complete 90 hours in an accounting environment.

Course Description: This course is the culmination of the many concepts learned throughout the education of Accounting Technology students. Activities and responsibilities will measure self-directed applications of learning. Upon completion of the course, the student will have an evaluation of and validation to the knowledge, skills, and abilities within the workplace. This appraisal will assist In both the professional and personal life of the student. The course will be graded as Satisfactory or Unsatisfactory.

)

Required Topics:

1. Practical experiences within the Accounting field.
2. Development of knowledge, skills, and abilities within the Accounting field.
3. Evaluation and assessment of work related topics and applications.
4. Prioritizing and maintaining high performance skills.
5. Providing feedback for skill Improvement and advancement.

Course Competencies and Corresponding Student Learning Outcomes: Upon successful completion of this course, the student will be able to

* 1. Interpret the accounting skills needed within the selected organization.
  2. Choose an organization and the procedures and goals to be observed and evaluated.
  3. Appraise procedures and goals with advisor and Identify work to be performed within the organization.
  4. Determine work hours necessary to complete goals and performance objectives.

## Course Syllabus for Accounting Technology—page 2

ACCT-260 Accounting Field Experience Standardized Course Syllabus

Page 2

* 1. Prioritize and evaluate a report of activities and responsibilities to be completed within the organization.
  2. In conjunction with site mentor, determine nature and scope of accounting work in which the student will be involved.
  3. Document student responsibility
  4. Assess performance and skill ability.
  5. Evaluate the field experience.
  6. Interpret and understand the documentation and assessment information gathered from the organization.
  7. Evaluate how to incorporate feedback for personal and professional advancement
  8. Establish a personal development plan to set a guideline for implementation of feedback from advisor and organization.

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## Letter of Recommendation

February 14, 2016

My name is and I am writing to you on behalf of name redacted. I have known

-for approximately four years. I was her teacher for the H&R Block Income Tax Course, a class which lasted approximately three months and served as a comprehensive introduction to preparing individual tax returns, from very easy to sometimes complex.-demonstrated in that

'i class her commitment to excel in everything she attempts. She attended class faithfully, completed all

, her assignments on time, asked questions for clarity, and showed a willingness to help others in the class if they were struggling with a concept which she had already mastered. She easily passed her final exam and the course as a whole.

-and I then worked together in one of the Lancaster offices for the next tax season. She showed a great attitude in working with clients, developing interview skills and building a rapport with them. We were saddened that certain health concerns prevented her from returning for a second season the following year, and would welcome her back if she so desired.

I would recommend-highly to you. Should you seek further information from me, I would welcome you to reach me on my cell phone at Thank you for your consideration.

Senior Tax Analyst H&R Block

## H&R Block Prerequisites for Employment as a Tax Professional—page 1

## 

**H&R Block Policy**

Subject:

Policy Number: Scope: Effective Date: Rc,·ision Date: Policy Owner:

Prerequisites for Employment as a Tax Professional

206

All Associates

.Jnnmu-y 1, 2008

May 16, 2014

Director, Learning Development

Applicants Who Have Not Previously Worked as a Tax Professional at H&R Block

To work us a Ta:,;. Professional in an H&R Block oflice, applicants who have not previously worked for H&R Block as a Tax Professional must successfully complete the H&R Block *fl1coml! Tax Cour,\I!* or pass the Tax Knowledge Assessment (TKA) with a score of 80 percent or greater.

To succcssli.lily complete the H&R Block */11co111e Tax Cowwe,* students:

* Cannot miss or foil to complete more than eight (8) hours or the ILT or practice session.
* Must complete all web-based modules that arc part of the self.study sessions
* Must receive a minimum cumulative score of70% on course c,•aluations and a score of 70% 011

the final exam.

In addition, individuals who complete the Income Tax Course must also complete tlin c (3) hours of updnte on federal tnx matters from an IRS-approved CE. provider. As in the past, any time pent co111plcting ITC, TKA or CE courses is personal to the individual's professional education. and as .such will not be compensated. Completing the ITC course or taking the TKA rn· CE hours is not n guarantee or employment.

**Applicants Who Have Worked as a Tax Professional at H&R Block During a Previous Tax Season**

To be eligible to be considered for rehire by I l&R Block, applicants who worked as a Tax Professional at l-l&R Block during the previous tax season must complete 15 hours of Continuing Education (CE) during the culcndar year prior lo the tax Si!USon for which the applicant is being considered for rehire, as outlined in the Ta'< Professional Continuing Education Guide.

In addition to the CE requirements, applicants who ha,·e previously worked for H&R Block. hut did 1101 work for I l&R Block during. the tax season immediately preceding the tnx season for which they arc npplying. 11111!,l ubo pass the TKA or complete and puss the I l&R Block *I11co11w TcLY Co11rse* to b eligible to he considered f'or rehire.

1

## H&R Block Prerequisites for Employment as a Tax Professional—page 2

Applicants arc 1101 required to take H&R Block tax courses to satisfy any or all of the CE requirements.

A list \_of nuthoriicd IRS CE providers can be f'ound on the IRS Web site nt ww,,•.irs.gov.

As in the past. nny time spent completing ITC, TKA or CE courses is personal to the individual's

prolcs:;ional education. and ns such will not be compensated. Completing the ITC course or Inking CE hours is not n gunrnntec oremployment.

**Preparer Tax Identification Number**

All H&R Block associates who prcpt1rc taxes as part of their job duties (including Tax Professionals, Premium Tax Profess\onals. Ta;x Prof"cssionnl Assistants. rmd Client Service Leaders) will be required to ha\'e a valid Preparer Tax Identification Numbe1· ("PTIN..) ns a condition of employment. PTIN's arc issued by the IRS lo paid tax return preparers. The IRS will no longer accept tux return preparers with social security numbers on tux returns.

Obtaining a **PTIN**

There arc several ways to obtain n PTIN:

1. For H&R Block Company associates, attend a district registration fair led by your District

) Opcrutions Coordinator. They will assist you with )'Our registration, including using a corporate uccounl to pay for the annual registration fee.

1. Apply online - Go lo the Web page [www.irs.gov,](http://www.irs.gov/) follow the instructions, and pay the registration fee: IRS PTIN registration fees nrc $64.25 for new registrations and $63 for annual renewals. which is subject to change.
   1. For reimbursement: If you arc a Company Tax Profcssional renewing on your own and seeking 1·eimbursemcnt, email a copy of the PTIN Confirmation to the OCOE al .U\_'-1 011 1 a! 11111:,/ti h1lihid, cn111 or fax it lo (866) 522·9218. Include your PcoplcSoli number on the document.
2. Apply by mail - Complete Form W-12. Send the form along with u check or money order for the fee to:

IRS Tax Pro PTIN Processing Center 104 l3rookcridgc Dri\'c #5000

Waterloo, IA 50702

2

## H&R Block Prerequisites for Employment as a Tax Professional—page 3

Allow '1-6 weeks to receive your PTIN. Please speak with n member of your district management team for further dctnils on how to apply for your PTIN or access the IRS tutorial link at ,,·ww.irs.gov.

Questions can be directed to the IRS PTIN hotline at 877-613-78.:16.

**Payment Methods for** a **PTIN**

Payment of the registration fee for H&R Block associates registering online must be through personal Visa®/1\fasterCnrd® or the approved company procurement accounts.

* 1. &.R Block registrants who apply for a PTIN using the paper method may only pay by check or money order and will be reimbursed.

**PTIN Rcimhul'scmcnt for Compuny Associales and Repayment Rcuuircmcnt**

H&R Block will reimburse H&R Block associates for PTIN registration fees for the 2015 tax season.

Individuals who arc not hired by H&R Block are not eligible for this reimbursement. Any associate whose employmcnt terminntes, whether voluntarily or involuntarily for cause, prior lo the end of the 2015 tax season, will be required to repay H&R Block any PTIN-related fees paid by H&R Block on the associate s behalf. including but not limited to, J>TIN registration, IRS competency examination. background check Ices, nnd Continuing Education fees.

) **Using mu] Protecting your PTIN**

Sharing your personal PTIN with anyone other than district leaders or administrators, or using the PTIN

of another with or without their knowledge is grounds for corrective action, up to and including tcnnination of employment.

* + - A PTIN expires evc1y year on December 31. It is the associote's responsibility to know the PTIN"s cxpirntion date. If an associate is issued a provisionnry PTIN from the IRS, which is valid tor a limited period of time, the associate must also track its expiration date.

Unable to Secure a PTIN

A valid PTIN is a requirement to be eligible to be considered for employment as a Tux Professional ,,..ith H&R Block and is also a requirement to maintain cmploymcnl. 1-l&R Block rcscn1es the right to refuse employment or terminate employment if an individual i.s unable to secure a PTIN.

Nnme Changes on a **PTIN**

If an associate has a name change, the associate should contact the Social Security Administrntion. It is very impo11ant to keep name, address, and other contact information cun·cnt with the IRS nml I l&R Block al all times. To submil name changes or address modilicntions during employment with I l&R Block, go to I IR Self Service/Employee Self Sen•icc/Pcrsonul l11for111ution on myBlock. To submit PTIN data changes. access your account with the IRS (pas5word required) or call the PTIN hotline at 877-613-7846.

**IRS Correspondence rci:ardiug PTIN**

3

## H&R Block Prerequisites for Employment as a Tax Professional—page 4

1f. associates receive any correspondence from the IRS regarding the associate;s PTIN during their employment. the associate should notify their District Manager us soon us possible, Most often, time­ sensitive material will be included, action will be required, and the information may need to be shared with additional H&R Block management and Human Resources.

**Note:** Associates arc no longer required to record their PTIN in PcoplcSort Self Scrvicc. This field will be view only.

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## IRS PTN Confirmation

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PTIN Conrirma!i(ln

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Expifali0r1Date:

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12/3)/2014

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If you•paymant Is un!lb!a ID be processed far l roaSDI!. your PTIN will blf SUS1)811ded aml you ,1:111hH 11011r.eu by mailcf Iha Dd.oos yw n osl takelo submit II ruplac..11,..111

P.Jy,Tt nl.

YOU HAVE COMPLElED THE PTINAPPUt l ION PROCESS. YOU MAY LOGOFF NOW OR SELECT NEXTTO REVIEW YOUR ACCOUNT WFORMATION.

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## H&R Block Tax Professional Employment Agreement—page 1

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**TAY PROFESSIONAL EMPLOYMENT AGREEMENT**

This Agreement is made between' . of

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{City) (State) (Zip )

("Associate"), and HRB Green Resources LLC

("the Companyj, These parties, in consideration of the covenants and agreements set forth below, agree as follows:

* + 1. **Employment,**

The Company employs Associate as a 5000 - First Year Tax Pro In the Company's

COLUMBUS SOUTH, OH District, Admln. ID#- , for the period and upon the terms and conditions herein contained. Associate hereby accepts such ment and agrees to comply with such terms and conditions.

* + 1. Tenn.

The term of this Agreement begins on the eariler of the following dates: the date Associate first attends Skills to Win training; the date Associate attends any other paid training; or December 1, 2014. The term of this Agreement shall end on April 16, 2015.

3, **Duties.**

Assoclate's duties consist of attending Skills to Win training, mid-season training, and other mandatory training, preparing accurate tax returns and offering electronic filing of returns to qualifying taxpayers, promoting and providing additional or alternative products or services which the Company or Its affiliates may offer; providing other information to clients that may be relevant to their tax and financial slllJation, and performing other duties as assigned, all In accordance with the law and the Company's pollcies and procedures, including the H&R Block, Inc. Code of Business Ethics & Conduct, Associate acknowledges that it Is outside the scope of Assoclate's employment hereunder and Is against the rules of the Company for Associate to offer any financial advice for which a llcense Is required.

**4. Compensation.**

The Company shall pay Associate an houriy rate of pay, the amount of which shall be determined by the Company labor code assigned to a specific project or task. Different projects or tasks are assigned different pay rates and the Company reserves the right to revise such rates at any time. Under no circumstance shall the hourly rate for any work performed be less than the federal or applicable state minimum wage. Associate shall be paid for all hours worked, Including overtime, in accordance with federal and

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applicable state wage and hour laws.

1. **Withholdings and Offsets,**

The Company shall withhold from all compensation payable to Associate all required federal, state, and local taxes. Associate agrees that if Associate falls ID rum over all Company funds as required by Company policy or becomes Indebted to the Company, the Company may, subject ID applicable laws, offset the amount of any such funds or Indebtedness against any compensation due

Associate.

**6, Hours.**

Assoclate's hours of employment will be as from time to time designated by the Company. Associate understands the seasonal nature and lluctuatlon of the Company's business and acknowledges the Company's exclusive right to reduce or Increase Associate's hours of employment based on business needs. Associate recognizes and agrees that there may be pay periods during which Associate Is not assigned any hours of employment. Associate agrees to be available to work until the end date of this Agreement. Associate hereby expressly acknowledges and agrees to abide *by* the Company's timekeeping policies by acOJrately recording all hours worked.

**7, Termination.**

* 1. Notwithstanding the above-described Term, either party may terminate this Agreement upon seven (7) days prior written notice.
  2. Furthermore, the Company may terminate this Agreement and the employment of Associate without notice upon a determination by the Company that Cause exists for such termination. For purposes of this Agreement, "CauseH shall Include, but is not limited to, the following:
     1. Assoclate's unsatisfactory performance as determined by the Company;
     2. Assoclate's misconduct that interferes with or prejudices the proper conduct of the Company's business or which may reasonably result In harm to the reputation of the Company;
     3. Associate's disobedience, Insubordination, job abandonment, fraud, theft, or any material violation of Company policies including, but not limited to, the H&R Block, Inc. Code of Business Ethics & Conduct;

Tax Professional

TS2015

Page 1

## H&R Block Tax Professional Employment Agreement—page 2

* + 1. Assodate's violation of any term of this Agreement or Associate's stated intention to violate any term of this Agreement;
    2. Associate's failure to meet the criteria for any Company-mandated background check;
    3. Assodate's conviction of or plea of guilty or no contest to a crime of dishonesty or theft during or prior to Associate's employment (subject to state law);
    4. Assodate's misrepresentation on the employment application or In this Agreement; or
    5. Assodate's failure to secure a Preparer Tax Identification Number {PTIN) in accordance with IRS regulations and Company requirements.
  1. Cause" shall also Include: (i) Assoclate's violation of any term of any prior employment agreement between Associate and the Company, (Ii) fraud or theft by Associate during any prior period of employment with the Company, and {Iii) material violation of any Company polk:y, Including the H&R Block, Inc. Code of Business Ethics & Conduct, by Associate during any prior period of employment with the Company.

1. **Confidential Information.**

Associate will be given access to Trade Secrets and other Confidential Business Information which has commercial value to the Company and Its affiliates (hereinafter together referred ID as "H&P. Block") the confidential nature of all such Information is hereby acknowledged by Associate. Jn consideration for the Company providing such access, and as a material term of this Agreement, Associate gives the Company the covenants contained In Sections 8, 9, 10, and 11 of this Agreement. Associate agrees and acknowledges as follows: I

* 1. Without the Company's prior written authorization, Associate shall not directly or Indirectly: (I) misappropriate, make copies of, or remove from H&R Block's offices *any* ConHdentlal Business Jnformatlon of H&R Block, (ii) make known, divulge, or communicate ID any peraon or entity *any* Confidentlal Business Information of H&R Block, or {Ill) use any Confidential Business Information of H&R Block for any reason other than as necessary to enable Associate to properly perform Assoclate's duties hereunder. Nothing In this Sectlon 8 shall be construed as limiting or Impeding an associate covered by the National Labor Relations

Act (the "Act") from exercising his or her rights under Section 7 of the Act by, for example, disclosing Terms and Conditions Information. "Tenns and Conditions Infonnatlonn refers to information concerning the wages, hours and tenns and conditions of employment for employees covered by the Act. Further; nothing herein shall be construed to prohibit the reporting of a violation of law or to prohibit a disclosure of Information that Is compelled by law; provided, however, that to the extent allowed by law, Associate will give the Company as much written notice as possible under the clrOJrnstances and will cooperate with the Company In any legal action undertaken to protect the conflclentlality of the information.

* 1. Upon cessation of employment hereunder; Associate shall promptly deliver to the Company the originals and all copies of Confidential Business Jnfonnation and other materials and property of any nature belonging to H&R Block.
  2. "Confidential Business Information" means all lnfonnalion learned by Associate as a consequence of Assoclate's employment with the Company, Including, but not limited to, H&R Block's client lists, Information pertaining to H&R Block's clients, private or sensitive employee Information (such as social security Information or birth dates, and information obtained from any confidential human resources or employee files/records to which Associate may have access), and H&R Block's tax preparation software. "Confidential Business Information" does not Include Information In the public domain through authorized disclosure by H&R Block or Information that Associate has received prior written authorization by H&R Block to disclose or otherwise use. Conflclentlal Business Information does Include Information about the business affairs of third parties (Including, but not limited to, the Company's clients) that such third parties provide to the Company In confidence.

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* 1. The designation of any Information as Confldentlal Business Information does not preclude It from also constituting a Trade Secret as defined by applicable law. Associate Is prohibited from using, disclosing, or misappropriating Trade Secrets of H&R Block at all times during and after Assodate's employment for so long as SU<;h Information remains a Trade Secret. Trade Secrets Include, among other things, H&R Block's dlent llsts and all Information pertaining ID H&R Block's clients.
  2. Information shall not be deemed to have lost Its status as a Trade Secret or Confldentlal Business Information as the result of any unauthorized disclosure by Associate or any other person or third party.
  3. Section 7216 of the Internal Revenue Code of 1986, as amended, prohibits the unauthorized use and/or disclosure of confidential tax return Information of the Company's clients, and Associate agrees that Associate will not at any time disclose or use such Information In violation thereof.
  4. The restrictions In this Agreement shall supplement, but not replace, any and all obligations Associate owes the Company under applicable law.

1. **Extent of Services.**

Associate agrees that during the term of Assoclate's employment Associate shall not directly or Indirectly:

* 1. Compete with the Company at any location or in any capacity by:
     1. preparing or electronically filing tax returns or providing any other product or service that the Company offers In the

Assoclate's district of employment (for example, bookkeeping If provided In the district); or

* + 1. sollcltlng or accepting any of the Company's clients for the aforementioned services.
  1. Be an Electronic Return Originator ("ERO") with the IRS.

Associate agrees and accepts as a condition of employment that during the term of Assodate's employment all tax reb.Jms Associate

prepares, Including any returns Associate prepares for friends and family, but excluding Assoc:late's own return, must be processed

Tax Prcresslonal

152015

Page 2

## H&R Block Tax Professional Employment Agreement—page 3

through the Company In accordance with Company policies and procedures as returns prepared by the Company. Associate may prepare and electronically file Assoclate's own tax return free of charge.

Associate shall not be In violation of Section 9(a){l) if providing the prohibited services for an H&R Block franchise.

. ) **10. Post-Tennlnation Covenants.**

a} Associate covenants that for two (2) years following the cessation of Assodate's employment hereunder for any reason (the ttRestrlcted Period"), Associate shall not directly or indirectly:

(l} Provide any of the following services to any Company Olent: (I) preparation of tax returns; (ii) electronic fillng of tax retums; or (Ill) any Alternative Products or Services; or

(2) Solicit Company Olents for the purpose of offering to such dient:s: (I) tax return preparation services; (11) electronic filing of tax returns; or (Ill) any Alternative Products or Services,

1. Associate agrees that the Restricted Period for each of the above covenants shall be tolled during (I) any perlod(s) of violation that occur during the original Resbicta:I Period; and {II} any period(s) of time required by litigation to enforce the OJvenant (other than any

periods during which Assodare is enjoined li'orn **engaging** In the prohibited activity and Is In compliance with such artier of enjolnment)

provlcled that the litigation Is filed within one year following theend of the original Restricta:l Period.

1. For purposes of this Section 10, ttCompany Cllentsff Is defined as every person or entity whose federal or state tax return was prepared or electronically transmitted by Associate, or for whom Associate provided any Alternative Products or Services, during the term of this Agreement or during any period of time In which Associate was employed by the Company or an affiliate during the twelve (12) months Immediately preceding the effective date of this Agreement.
2. For purposes of this Section 10, "Alternative Products or Services" means products or services, other than the preparation or electronic filing of tax returns, that the Company provides to dlent:s within Assoclate's district of employment (for example, bookkeeping if provided In such district).
3. In the event a duly appointed arbitrator (or where permitted under Section 17, a court of competent jurisdiction) finds the time period, geographic scope, scope of activity, or any definition contained In this Section 10 to be overly broad, the time period, geographic scope, scope of actlvity, or definition that such arbitrator or court deems reasonable shall be substituted for the language In this Agreement (where allowed by applicable Jaw).
4. Associate shall not be In violation of Sectlon lO(a)(l) if providing the prohibited services for an H&R Block franchise.
5. Sections lO(a) and (b) are not applicable to associates employed In the state of North Dakota.
6. Section 10(b) Is not applicable to associates employed In the stat:es of Georgia or Wisconsin.
   1. For Associates employed In the state of Arizona or Puerto RJOJ, the Resbicted Period In Section lO(a) shall be one (1) year

\ following the cessation of Assoclate's employment

*I* j) For Associates employed In the State of Louisiana, Sections 10(a)(l) and (2) are limited within the state of Louisiana to

the Parishes In which Associate assisted Company In providing its products and services, and Parishes adjacent to such Parishes (or OJUnties of adjacent states), as Identified In Attachment A to this Agreement; provided, however, that nothing In this Agreement may be OJnstrued to prohibit the enforcement of Sections lO(a)(l) and (2) In accordance with their terms In states outside of Louisiana.

1. **Nonsolldtation of Employees.**
   1. Associate OJVenants that during Associate's employment hereunder and for one **(1)** year following the cessation of such employment for any reason, Assoelate shall not, directly or Indirectly, solicit or hire Company Employees to work In any business that provides any product or services In competition with the Company.
   2. For purposes of this Agreement, ttCompany EmployeesH mean persons employed by the Company or Its affiliates at the time of the solicitation or hiring or at any time during the term of this Agreement, Where required by applicable law to be enforceable, the foregoing restriction shall only apply to Company Employees employed by Company or Its affillates within the Dlsbict Identified In Section 1,
   3. Section ll(a) Is not appllcable to associates employed In the state of Wisconsin. Associates employed In Wisconsin covenant that during Assoclate's employment hereunder and for one (1) year following the cessation of such employment for any reason, Associate shall not, directly or Indirectly, solicit Company Employees to terminate their employment with the Company.
2. **Remedies.**

The parties agree that if any provision of Section 8, 9, 10, or 11 Is violated, the Company will have no adequate remedy at law and will suffer Irreparable loss and damage. The parties further agree that In the event of any such breach or violation, whether threatened or actual, the Company shall be entitled to Injunctive relief to prohibit or restrain such breach or violation In addition to all other remedies available at law or equity. Assoelate agrees that no bond need be flied In connection with any request by the Company for a temporary restraining order or other preliminary Injunctive relief. ln addition to Injunctive relief, Associate acknowledges that the Company Is entitled to damages for any breach of Section B, 9, 10, or 11. Further; In the event of such breach or violation, Associate shall pay the Company all costs, reasonable attorneys' fees, and expenses lnamed by the Company In enforcing Sections B, 9, 10, or 11 of this Agreement. Further; Associate acknowledges that damages for breach of Section 9 are difficult, If not Impossible, to establish and Associate therefore agrees to liquidated damages as set forth below. Associate acknowledges and agrees that these sums are a reasonable forecast of the harm caused by the breach In Ilght of the anticipated or actual loss caused by a breach and the dlffiOJlties of proof of loss. Associate agrees that this llquldated damages provision shall not

be construed as a payment to avoid Assoclate's obligations under Section 8, 9, 10, or 11 hereof and further agrees that the Company shall be entitled to Injunctive rellef In addition to enforcement of this liquidated damages provision.

ln the event Associate breaches Section 9 of this Agreement, Associate shall pay to Company a lump sum of $1,000 per tax season

) of employment up to a $10,000 maximum (a partial tax season shall be counted as a tax season}.

## H&R Block Tax Professional Employment Agreement—page 4

Any violation of Section B, 9, 10, or 11 shall otherwise be resolved In accordance with the arbitration agreement In Section 17, unless Associate opts out In accordance with Section 17(h).

**13, Agreement Regarding Products and Services of H&R Block, H&R Block Bank, and Bofl Federal Bank,**

AsSOdate agrees to comply with the following conditions In offering the H&R Blod< Emerald Advance® Line of Credit, H&R Block Emerald Savings®, H&R Block Emerald Prepaid MasterCard@, Refund Anticipation Checks, credit cards, and other H&R Block­ branded bank products and services and in offering other financial products and services of any other financial Institution with which H&R Block partners to offer these products and services. Associate will comply with all H&R Block and Bofl Federal Bank Operating Policies and Procedures and required training related to the above products prior to conducting any facllitatlon mari<etlng, solicitation, customer service or credit service organization activities. Associate acknowledges that H&R Block Bank, Bofl Federal Bank, and other financial Institutions have the right to monitor, review, and audit activities Associate performs In connection with such entities' respective products and services. Associate acknowledges that the primary federal regulator of H&R Block Bank and Bofl Federal Bank (the Office of the Comptroller of the Currency) and H&R Block's primary regulator for banking purposes (the Federal Reserve) have the authority to regulate, examine, and take enforcement action against the Company, its affiliates, H&R Block Bank, and Bofl Federal Bank with respect to the activities perfonned In connection with H&R Block Bank's and Bofl Federal Bank's products or services, and Associate acknowledges that federal and state banking and consumer products regulators may have the authority to regulate, examine, and take enforcement action against the Company and Its affiliates and other financial Institutions with respect to certain activities performed In connection with these products or services.

**14, Tax Preparer Penalties.**

As a condition of employment, Associate agrees to provide to the Company, Immediately upon receipt, a copy of any notice or communication Associate receives from the Internal Revenue Service or any state ta,dng authority related to Assoclate's tax preparation practices or tax preparer penalties proposed or assessed against Associate. Associate further agrees to authorize the Internal Revenue Service or state taxing authority to share with the Company and Its affiliates all notices and communications related to the proposed or assessed penalties. Associate expressly acknowledges and agrees that Associate may be personally responsible for paying preparer penalties assessed by the Internal Revenue Service or state taxing authority.

**1s. Representations of Associate.**

* 1. Associate represents that Associate has never had a Form 8533 (Appllcatlon to Participate in the Electronic Filing Program) denied by the Internal Revenue Service and has never been suspended or rejected from such program prior to this Agreement Associate further represents that Associate has not currently applied for or been accepted as an Electronic Filer other than by virtue of any appllcatlon made through or on behalf of the Company.

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* 1. Associate represents that all statements made on Associate's employment application, lnc:ludlng those regarding Assoclate's almlnal background, are true and accurate.
  2. Associate represents that Associate Is not subject to any contract that would prohibit performance of his/her duties hereunder.

**16. Enforcement.**

Associate agrees that the C.Ompany's fallure to require strict compliance with any term, condition, or covenant contained In this Agreement at *any* time shall not be deemed a waiver of that or any other term, condition, *or* covenant contained In this Agreement.

1. **Mutual Arbitration Agreement.**
   1. Binding Mutual Arbitration. This Mutual Arbitration Agreement in Section 17 ("Arbitration Agreement") is between Associate and the Company. Associate and the Company agree that any Covered Claims (defined below) will be resolved by final and binding arbitration as set forth in this Arbitration Agreement, unless Associate opts out pursuant to Section 17(h) below. Any reference to the Company In this Section 17 will be a reference also to the Company's direct or Indirect parents, subsidiaries, affiliates, predecessors, and successor entitles, Including without limitation any H&R Block business entity for which Associate applied for employment and/or was employed. This Arbitration Agreement shall be governed by the Federal Arbitration Act (FAA) (9

U.S.C. sections 1 et seq.), and evidences a transaction Involving commerce. This agreement to arbitrate applies with respect to all

Covered Oalms, whether **Initiated** by Associate or the Company. All Covered Claims shall be decided by an arbitrator through Individual arbitration and not by way of court or jury trial.

* 1. Covered aalms. This Arbitration Agreement Is Intended to be as broad as legally pennlssible and to apply to the resolution of disputes that otherwise could be resolved In a court of law or before a forum other than arbitration. Except for the Exduded Claims (defined below), Covered Oalms Include any and all past, present, and future claims or disputes between late and the Company, or the Company's direct or Indirect parents, subsidiaries, affiliates, predecessors, and successor corporations and business entitles, and Its and their officers, directors, employees, and agents, Including but not limited to claims and disputes arising out of or In any way relating to Assoclate's hiring or recruitment, Associate's employment, compensation, benefits, and terms and conditions of employment with the Company, or the tennlnation thereof, Including but not limited to contract, tort, deFamatlon and other common law claims, wage and hour claims, statutory dlsoimination, harassment, and retaliation claims, and claims arising under or relating to any federal, state or local constitution, statute or regulation, Including, without limitation, the Fair Labor Standards Act ("A.5A"), Tille VII of the Civil Rights Act of 1964 ("Title VII"), the Age Discrimination in Employment Act ("ADEA"), the Worker Adjustment and Retraining Notification Act ("WARN"), the Equal Pay Act ("EPA"), the Americans With Disabilities Act

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Page 4

## H&R Block Tax Professional Employment Agreement—page 5

C'ADAH), the Family and Medical Leave Act ("FMLA'1, the Fair Credit Reporting Act ("FCRAH), and any and all other federal, state, or local constitutional, smtutory, regulatory, or common law claims or causes of action now or hereafter recognized.

Further, Covered aalms Include any disputes regarding this Arbitration Agreement or any portion of the Arbitration Agreement or Its Interpretation, enforceability, applicability, unconsdonablllty, arbltrabillty or formation, or whether the Arbitration Agreement or any portion of the Arbitration Agreement is void or voidable, with the exception noted in Section 17(e) below.

* 1. Excluded Claims. The following dalms and disputes are not subject to arbitration under this Arbitration Agreement: {I) applications for temporary or preliminary Injunctive relief In aid of arbitration or for the maintenance of the status quo pending arbitration, {II) claims arising under, relating to or In connection with an employee benetlt plan subject to the Employee Retirement Income Security Act of 1974 ("ERISA"), which shall be determined In accordance with the dalms and dispute resolution procedures set forth In the applicable ERISA plan documents, {ill) dalms for workers' compensation benefits (however, retaliation and dlserfmlnatlon claims arising out of or relating to claims for workers' compensation benefits are covered under this Agreement), (Iv) dalms for unemployment compensation benefits, and (v) disputes that may not be subject to pre-dispute arbitration as expressly provided by the Dodd-Frank Wall Street Reform and Consumer Protection Act or other controlling federal statutes. Regardless of any other terms of this Arbitration Agreement, a claim may be brought before and remedies awartled by an administrative agency If applicable law pennlts the agency to adjudicate the claim notwithstanding the existence of an agreement to arbitrate. Such administrative claims Include without limitation claims or charges brought before the Equal Employment Opportunity Commission (www.eeoc.gov), the U.S. Department of Labor (www.dol.gov), the National Labor Relations Boartl (www.nlrb.gov), or the Office of Federal Contract Compliance Programs ([www.dol.gov/esa/ofccp).](http://www.dol.gov/esa/ofccp)) Nothing In this Arbitration Agreement shall be deemed to preclude or excuse a party from bringing an administrative claim before any agency In order to fulfill the party's obligation ID exhaust administrative remedies before making a dalm In arbitration. The Company will not ret:illate against Associate for filing a claim with an administrative agency.
  2. Eurther ex slon. This Arbitration Agreement does not apply to any causes of action already pending In court on the date Associate Agreement, lndudlng any class, collective, or represent:itlve action, for which Associate Is already a member or potential member of the class, collective, or representative action ("Pending Calms"). This Arbitration Agreement . however, apply to any Pending Calms that were flied against the Company before Associate was ever employed with the Company. Additionally, If Associate previously signed (and did not opt out of) an agreement to arbitrate claims with the Company prior to

commencement of a Pending Claim and that Pending aaim was covered by the prevlOus agreement to arbitrate, that previous

agreement to arbitrate would continue to apply to the Pending Claim, even if Associate opts out pursuant to Section 17(h) below.

* 1. dass and Representative Action Waiver.

TO THE MAX[MUM EXTENT PERMITTED BY APPLICABLE LAW, ASSOCIATE AND THE COMPANY AGREE THAT NO COVERED CLAIMS MAY BE INmATED OR MAINTAINED ON A CLASS, COLLECTlVE OR REPRESENTATIVE AcnON BASIS EITHER IN COURT OR IN ARBITRATION, AND THAT ASSOCIATE IS NOT ENTITLED TO SERVE OR PARTIOPATE AS A CLASS, COLLEcnVE OR REPRESENTATIVE ACTION REPRESENTATIVE OR AS A CLASS, COLLECTlVE OR REPRESENTATIVE AcnON MEMBER, OR RECBVE ANY RECOVERY FROM A a.ASS, COll.ECTIVE OR REPRESENTATIVE ACTION INVOLVING COVERED CLAIMS EITHER IN COURT OR IN ARBITRATION.

) THE COMPANY AND ASSOOATE HEREBY WAIVE ANY RIGHT FOR ANY DISPUTE TO BE BROUGHT, HEARD, DEODED OR

ARBITRATED AS A a.ASS AND/OR COll.ECTlVE AcnoN ("Class Action Waiver"). Notwithstanding any other clause contained In this Agreement, the preceding sentence shall not be severable from this Arbitration Agreement Jn any Instance In which the Covered aatm Is brought as a class and/or collective action. To the extent the aass Action Waiver Is determined ID be Invalid, unenforceable, or void, the class action must proceed In a court of law and not In arbitration.

THE COMPANY AND ASSOCIATE AL50 HEREBY WANE ANY RIGHT FOR ANY DISPUTE TO BE BROUGHT, HEARD, DEODED

OR ARBITRATED AS A PRIVATE ATIORNEY GENERAL REPRESENTATIVE ACTION ("Represent:itlve Action Waiver"). However, this Representative Action Waiver may be severed If It would otherwise render this Arbitration Agreement unenforceable In any action brought under a private attorneys general law, and following severance the representative action must be brought In a court of law and not In arbitration.

Notwithstanding any other clause of language contllned In this Arbitration Agreement and/or any rules or procedures that might otherwise be applicable by virtue of this Agreement or by virtue of any arbitration organization rules or procedures that now apply or any amendments and/or modifications to those rules, any claim that this Class Action Waiver or Representative Action Waiver; or any portion of this aass Action Waiver or Representative Action Waiver, is unenforceable, Inapplicable, unconscionable, or void or voidable, shall be detennlned only by a court of competent jurisdiction and not by an arbitrator.

* 1. SelectJon and Rules. The parties shall select the neutral arbitrator and/or arbitration sponsoring organization by mutual agreement. If the parties cannot mutually agree to an arbitrator and/or arbitration sponsoring organization, the arbitration will be held under the auspices of the American Arbitration Association 1MA "), and except as provided In this Arbitration Agreement, shall be under the then current Employment Arbitration Rules of the MA C'MA Rules") (the MA Rules are available through the

Company's Human Resources Department or via the Internet at [www.adr.org/employment](http://www.adr.org/employment) or by using a service such as [www.google.com](http://www.google.com/) to search for·MA Employment Arbitration Rules".) To the extent *any* of the terms, conditions or requirements of this Arbitration Agreement conflict with the MA Rules, the terms, conditions or requirements of this Arbltatlon Agreement shall govern. Unless the parties jointly agree otherwise, the Arbitrator shall be an attorney experienced In employment law and licensed to practice law In the state In which the arbitration Is convened, or a retired judge from any jurisdiction (the "ArbltralDr"). Unless the parties jointly agree otherwise, the arbitration shall take place In or near the dty In which Associate is or was last employed by the Company. In the event the parties mutually choose a sponsoring organization, or MA ts designated, the Arbitrator shall be selected as follows: The selected organluitlon shall furnish a list of eleven (11) arbitrators from which the parties shall sbike

alternately, with the party sb'iklng first to be determined by a coin tnss, until only one name remains. That person shall be designated as the Arbitrator. If for any reason, that person cannot serve, the selected organization shall Issue another list of eleven

(11) arbitrators and repeat the selection process.

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## H&R Block Tax Professional Employment Agreement—page 6

The Arbitrator is required to issue a written award and opinion, and any judgment or award issued by an arblb'ator may be entered In any court of competent jurisdiction. The arbitration shall be subject to the same burdens of proof and statutes of limitations as if the Covered Oalm was being heard In federal dtstrlct court, and the parties may file and the arbitrator shall hear and decide at any point In the proceedings motions to compel discovery, motions for protective orders, motions to dismiss, motions for

) summary judgment, and motions In llmine. No arbitration award or decision shall have any preclusive effect as to any Issues or dalms In any dispute, arbitration or court proceeding where any party was not a named party In the arbitration, unless and except

as perrnlttEd by applicable law.

* 1. Remedies. Subject to the parties' right ID seek correction, modification, or vacatur under the FAA, Associate and the Company agree that the award of the arbitrator will be final and binding on the parties and that the arbitrator may award any party any remedy ID which that party Is entitled under applicable law, but such remedies shall be limited to those that would be available to a party In his or her Individual capacity In a court of law for the claims presented to and decided by the arbltratnr, and no remedies that otherwise would be available to an Individual In a court of law will be forfeited by virtue of this Arbitration Agreement. Each party will pay the fees for his, her or its own attorneys, subject to any remedies to which that party may later be entitled under applicable law, The Company shall be responsible for all arbitration filing fees, forum fees, and fees of the arbitrator.
  2. Arbjtratlon Opt•Oyt Associate may opt-out of this Arbitration Agreement In Section 17 by submitting a signed written statement that Associate wishes to opt-out and not be subject to this Arbitration Agreement In Section 17. In order to be effective, the written statement must Include Assoclate's full name, address, and employee ID number; and must be submitted to **H&R Block-Legal Department, Attention: Arbitration Opt-Out, One H&R Block Way, Kansas City, Missouri 64105** within thirty

(30) days of Assodate's signing of this Agreement. Assoclate's written opt-out of the Arbitration Agreement will override Assoclate's signature below regarding arbitration for purposes of Section 17, but no other provision of this Agreement or prior or future arbitration agreements between Associate and the Company. Any associate choosing to opt-out of the Arbitration Agreement wlll not be subject to any adverse employment action as a consequence of that decision.

**18, Severablllty.**

Except as set forth In Section 17, above, the provisions of this Agreement shall be severable. If any provision hereof shall be determined to be legally unenforceable or void, such unenforceable or void provision shall not affect the legality, validity or enforceabllity of the remaining provisions hereof. If the Oass or Representative Action Waiver set forth In Section 17(e) is determined to be invalid, unenforceable, or void with respect to any Covered Claim, the Waiver shall remain effective and enforceable with respect to all other Covered Claims.

**19, Survival; Asslgnablllty.**

The parties agree that the covenants and agreements contained In Sections 8 through 21, Including the Arbitration Agreement In Section 17, shall survive the termination of this Agreement and/or the termination of Assoclate's employment and shall, likewise, continue to apply and be valid notwithstanding any change In Assodate's duties, responsibilities, position, or title, and/or the expiration of any benefit This Agreement Is assignable by the Company to any other party without notice to, consent by, or approval by Associate. Associate shall not assign this Agreement. This Agreement shall inure to the benefit of the successors and

) assigns of the Company.

1. **Notices.**

All notices required to be given hereunder shall be In writing and shall be deemed served and delivered for all purposes if dellvered In person; If delivered by e-mail or fax (with confirmation of delivery); or If malled, postage prepaid, to Associate at the above­ stated address or to the Company at the principal office for the district of employment, except as noted In Section 17(h), Any notice given by mall shall be deemed given as of the date malled and postmarked or received by a nationally recognized overnight courier for delivery.

1. **Entire Agreement.**

The foregoing is the entire Agreement between the parties as to the terms and conditions of Assodate's employment and the subject matter of each of the paragraphs and subparagraphs of this Agreement, and no amendment of this Agreement will be effective unless In writing and signed by the parties or Is by order of a duly-appointed arbitrator or; where permitted by Section 17, by a court of competent jurisdiction.

IN WITNESS WHEREOF, the parties have executed this Agreement on the day and year noted below.

**By dleddng the sign and submit button, you are Indicating your agreement to the above terms and mnditlons, lndudlng but not** ffmlted **to the Arbitration Agreement: and Cass and Representative Actk,n Waiver** In Seaion 17 and Arbitration **Opt-OUt** In Seaion 17(h), **THIS EMPLOYMENT AGREEMENT CONTRACT CONTAINS A BINDING** ARBITRATION PROVISION WHICH MAY BE ENFORCED BY THE **PARTIES.** Checking the button will

serve as your electronic signature. Once you have checked that button, a signature date will display In this document,

below,

/s/ HRB Green Resources LLC Company

Date Signed: 11/18/2014

Tax Professional

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Page 6

## Employment Verification Form—Department of Homeland Security—

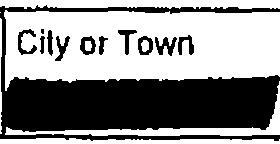
## page 1

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Department of Homeland Security

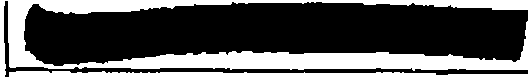
U.S. Citizenship and Immigration Services

**...START HERE. Read Instructions carefully before completing this form. The Instructions must be available during completion of this form. fNTl·DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which ilocumenl(s) they will accept from an employee. The refusal to hire an individual because the documentation presented l1as a future expiration dale may also constitute illegal discrimination.



|  |  |  |  |
| --- | --- | --- | --- |
| **Section 1. Employee Information and Attestation** *(Employees must complete and sign Section 1 of Fonn 1-9 no later*  *than the* ***first day of omp/oymen*** *but not before accepting* a *jab offer.)* | | | |
| Las! Name *(Family \_!'Jame)* l=ird "'"m" *((':/van Name)* | Middle Initial | Other Names Used *(if arly)* | |
| Address 1 11uu, *,vu11,oor and Name)* Apt. Number  NIA  Date or Birth *(mmlddlyyyy)* IU S Social Security Number E-mail Address |  | -Zip Code |  |

I **am aware that federal law provides for Imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.**



I attest, under penalty of perjury, that I am (check one of the following):

## X A citizen or the United States

A noncitlzen national of the United Stales *(See ins/ructions)*

A lawful permanent resident (Allen Registration Number/USCIS Number):-----------

An alien authorized to work until (expiration dale, if applicable, mm/dd/yyyy) . Some aliens may write "NIA" in this field

*(See instnictions)*

*For* aliens *autho1ized to* work, *provide your Alien Registration Number/USC/S Number* ***DR*** *Form /-94 Admission Number:*

) 1. Alien Registration Number/USCIS Number:

**3-0 Barcode**

**Do Not Write** In **This Space**

**OR**

**2.** Form 1-94 Admission Number:----------------

Ifyou obtained your admission number from CBP in connection with your arrival in the United States, include the following:

Foreign Passport Number:---------------------­

Country of Issuance:------------------------

Some aliens may write "NIA'' on the Foreign Passport Number and Country of Issuance fields. (See *instructions)*

Signature of Employee Date *(mmlddlyyyy):* **11/19/2014**

**Preparer and/or Translator Certification** *(To be completed and signed if Section 1 ls prepared by* a *person other them the employee.)*

I attest, under penalty of perjury, that I have assisted in the completion of this form and that to the best of my knowledge the information is true and correct.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature of Preparer or Translator; |  |  | IDate *(mmlddlyyyy)* |  |
|  |  |  |  |  |
| Lar.l Name *(Family Name)* | First Name *(Given Name)* |  |  | - |
| Address *(Street Number and Namu)*  ' | City or Town | | State IZip Code | |

## Employment Verification Form—Department of Homeland Security—page 2

***Employer Completes Next Page***

Section 2. Employer or Authorized Representative Review and Verification

*(Employers or their authorized representative must complete and sign Section* 2 *within 3 busl11ess days* of 1/Je employoe's *first day of employment.* You *must physically examine* one *document from Lisi A OR examine* a *combination of ona document from Ust B and* one *document from List* c *as listed on the "Lists of Acceptable Documents" on the next page* of *tlr/s form. For each document you review, record the following infonnolion: document ti/le.*

*Issuing authority, document number, and expiration date, If any)*

/ Employee Last ;me, First Name and Middie Initial fro \_s\_e\_c\_u\_on\_1**L.**=**!:'** =:;::;:;.\_

List **A OR** List 8 **AND** List C

Identity and Employment Authorization Identity Employment Authorization

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Issuing Authority, Issuing Authority;

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Expiration Date *(If any)(mmlddlyyyy}:* Expiration Date *(if any)(mmlddlyyyy).*

**3-D Barcodo**

Do Not **Write** tn This Space

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Certification

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment *(mmldd!yyyy):* **(See** *Instructions for exemptions.)*

I I

Signature of Employer or Authoriz:ed Representative Dale *(mmlddlyyyy)* Tille of Employer or Authorized Representative

|  |  |  |  |
| --- | --- | --- | --- |
| 11/19/2014 | | | |
| Last Name *(Family Name}* First **Name** *(Given Name)* E | | mployer's Business or Organization Name | |
|  | | HRB Tax Group, Inc. | |
| Employer's Business or Organlzallon Address *(Street N11mber and Name)*  One H&R Block Way | City or Town IState  Kansas City MO | | Zip Code  64105 |

**Section 3. Reverification and Rehires** *(To be completed and signed by employer or authorized represe11tallve.J*

**A.** New Name *(if applicable)* Last Name *(Family Name)* First Name *(Given Name)*

Middle Initia

Il **B.** Date or Rehire *(if applicable) /mmlddlyyyy)*

Document Title. IDocument Number;

|  |  |
| --- | --- |
| **C.** Ir employee's previous grant or employment authorization has expired, provide the inlormatlon for the document from Lisi A or Lisi C the employee presented that eslablishes current employment authorization In lhe space provided below. | |
|  | Expiration Date *(If ony)(mm1dcVyyyy}'* |

## Employment Verification Form—Department of Homeland Security—page 3

I attest, under penalty of perjury, that to the best of my knowledge, this employee Is authorized to work In the United States, and if

the employee presented documont(s), the document(s) I have examined appear to be genuine and lo relate to the individual.

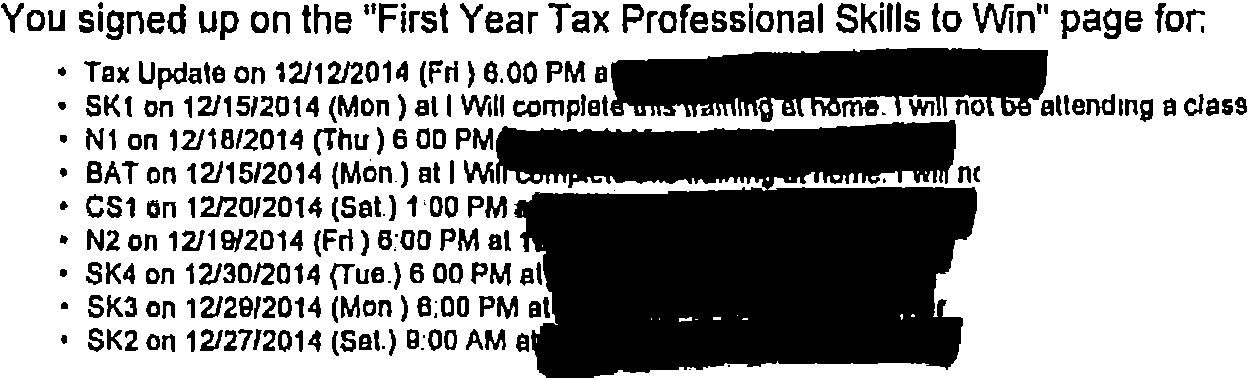
|  |  |  |
| --- | --- | --- |
| Bignalure of Employer or Aulhorized Represenlat1ve:  I | Dale *(mmlddlyyyy).* | Print Name or Employer or Authorized Representative |

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## Signup Page for “First Year Tax Professionals Skills to Win” Courses

**THANK You!**



not be allending a class

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Toll Y4ur Friondsl

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[http://www.signupgcnius.com/index.cfm7go=s.ThankYou&sl=54DFCEDAF4CAF9620BO...](http://www.signupgcnius.com/index.cfm7go%3Ds.ThankYou%26sl%3D54DFCEDAF4CAF9620BO) 12/1/2014

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## Completion Certificate for ACA Specialist at H&R Block

**A** Home Mail Search

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**X**

Jnbox (2059)

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Sent

**Spam (453)**

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**H&R BLOCK.** C O i\I P ;.\ S S



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Congratulations.  **your hard work has paid** off! **You have** Just **completed** the **ACA Specialist Certification Exam!** By increasing your certification level you have deepened your tax **knowledge** and gained vvaluable experience to serve mare clients.

## Test Score Report for “PCI Compliance Essentials” Course showing Passage of Course

tayer Results Information https://cclibrary.skillport.com!custom/sccp/sphrb/web/Content/scplSCP\_V7\_l 1\_5\_505/en/ass...

**Test Score Report**

**Student Name:**

**Course Title: Start Date:**

**Current Course Score: Completion Status: Completion Date:**

PCI Compliance Essentials

Dec 27, 2014

100%

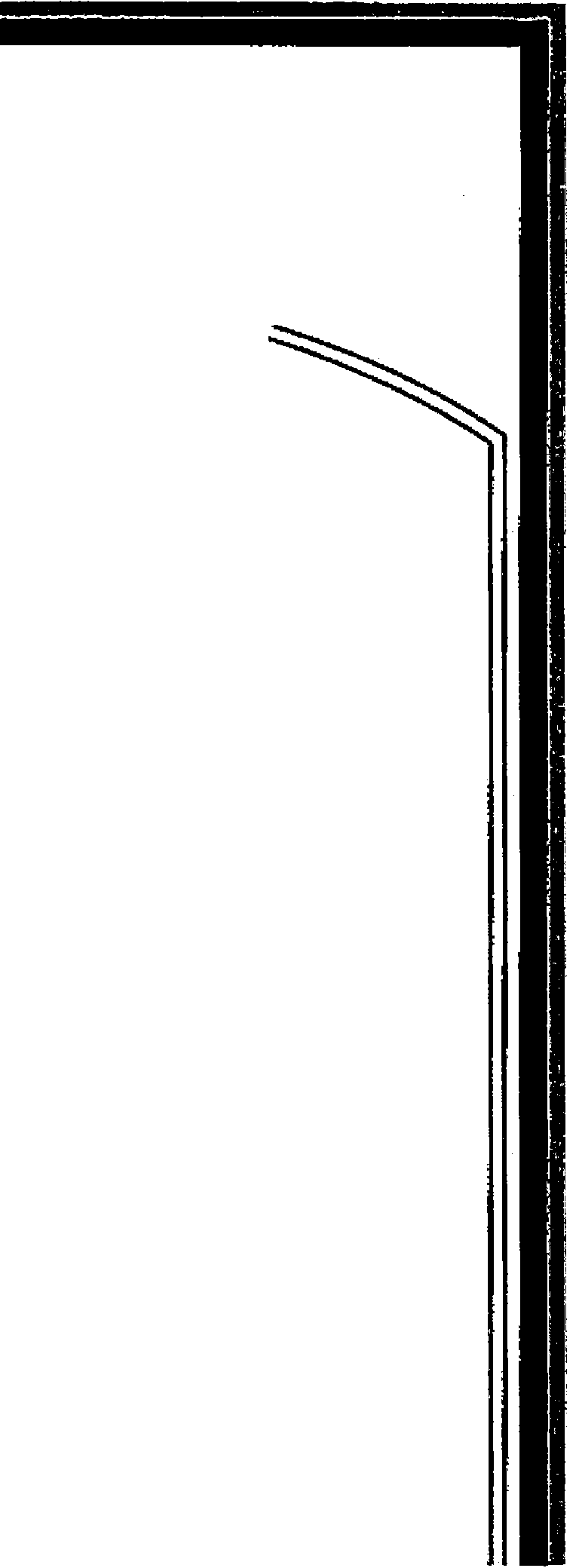
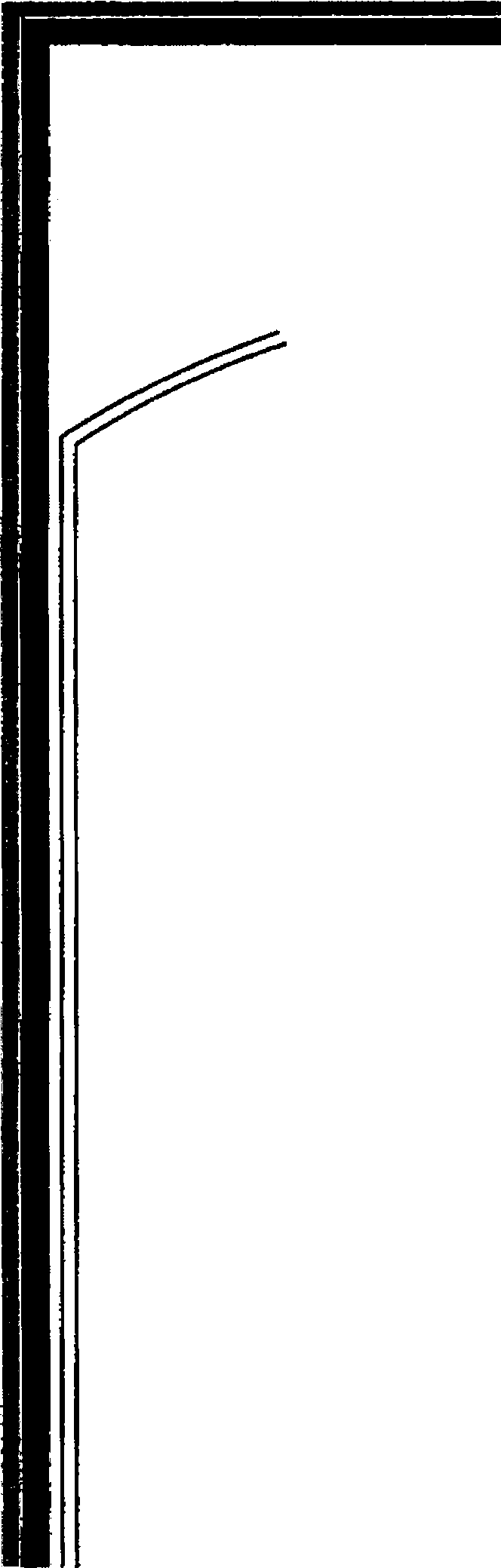
Completed Dec 27, 2014

**In order to complete this course you must:** *OD? £!:·t t/1;*

* Achieve a minimum course score of 80%
* Complete all test questions

|  |  |  |  |
| --- | --- | --- | --- |
| **Scores** | **Pre-Test** | **Highest** | **Current** |
| **PCI Compliance** | 72% | 100% | 100% |
| Introduction to PCI Compliance | 67% | 100% | 100% |
| Determining the legitimacy of a Payment Card | 50% | 100% | 100% |
| Protecting Cardholder Data During Transactions | 100% | 100% | 100% |

## H&R Block Certificate of Completion for TP S2W Knowledge Check:December—Blockworks Release Practice



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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0

CTEC CPE Hours: 0

In recognition of successfully completing

TP S2W Knowledge Check: December BlockWorks Release Practice

on December 27, 2014 with a score of BO %

Delivery Method : Self-Study

Field of Study Federal Tax Law o Tax Update 0

Ethics 0

state 0

Course Number: 00065168 CTEC Number. NIA NASBA Sponsorship ID: Federal Course ID:

Federal Sponsorship ID:

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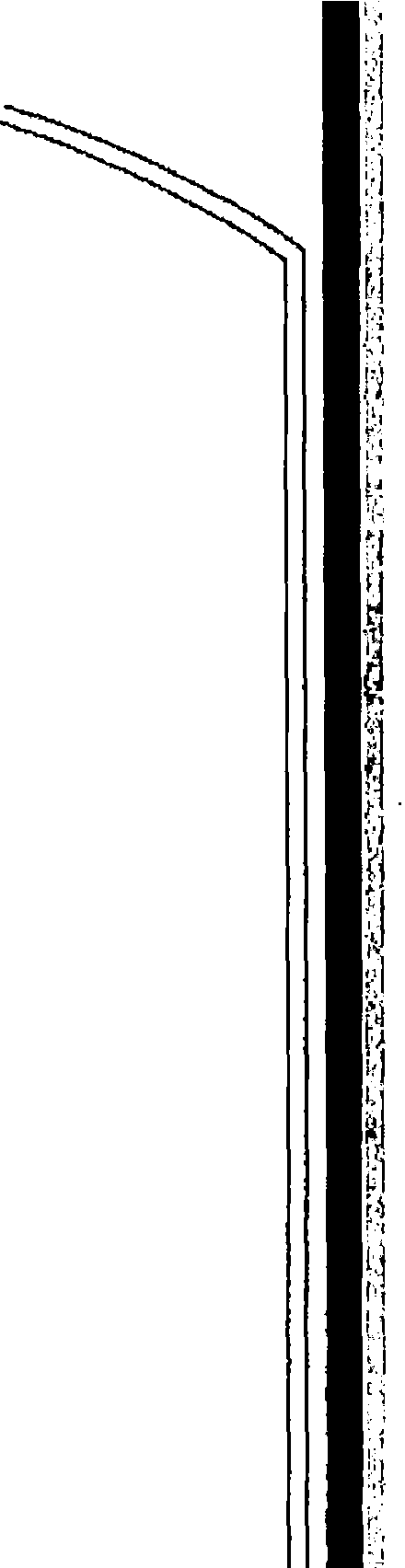
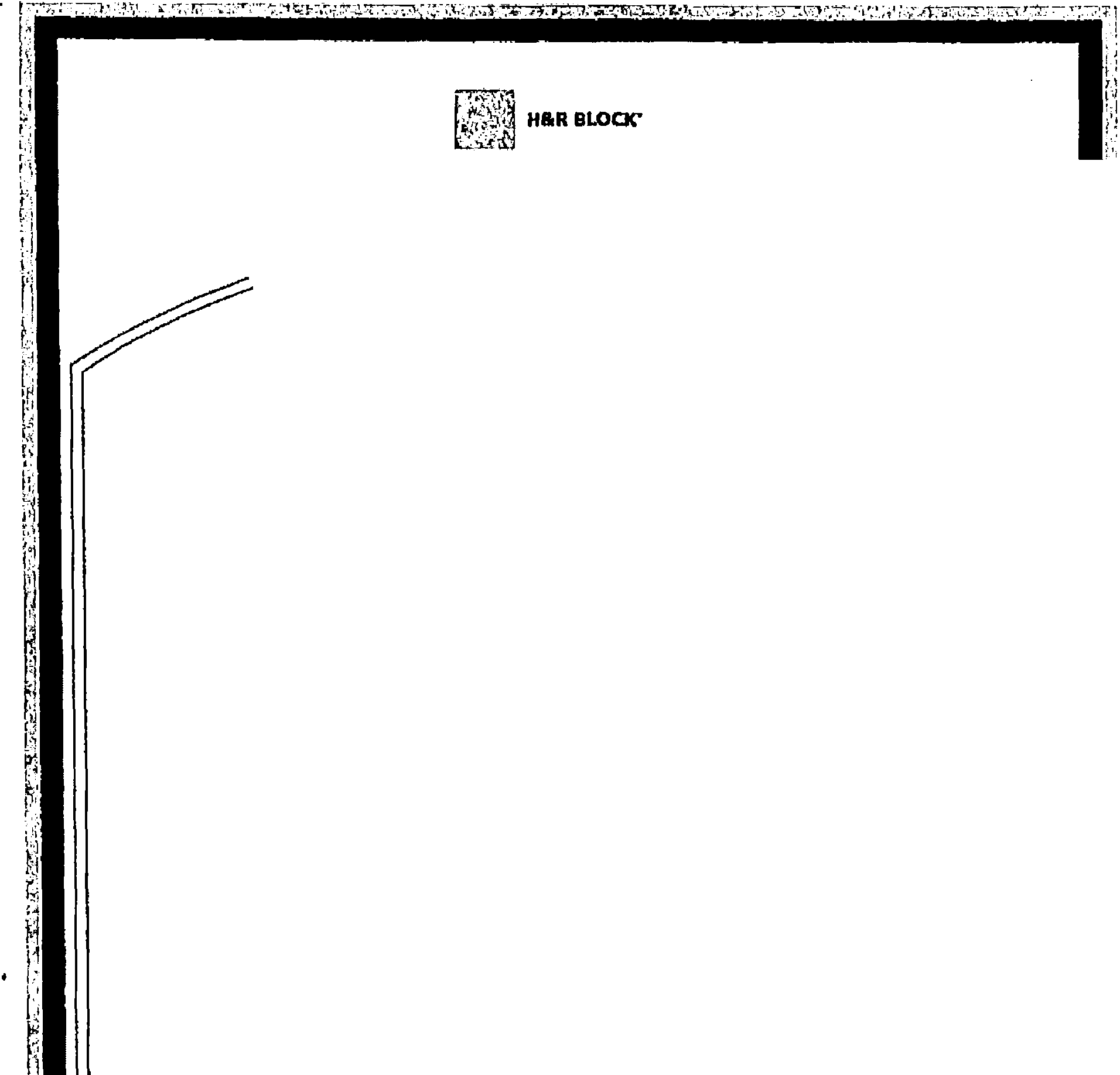
## H&R Block Certificate of Completion for FYTP S2W Knowledge Check:

## Delivering Front Desk Excellence Course

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

In recognition of successfully completing

**FYTP S2W Knowledge Check: Delivering Front Desk Excellence**

on December 20, 2014 with a score of 83 %

*)* Dollvery Method : Self-Study

Field of Study

Federal Tax Law O

Course Number: 00065142 CTEC Number: N/A

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Tax Update 0

Ethics 0

State 0

**NASBA** Sponsorship ID: Federal Course ID: Federal Sponsorship ID:



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One H&R Block Way, Kansas City MO 64105

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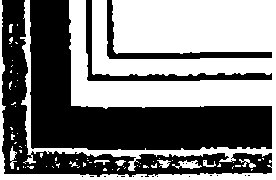
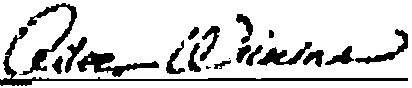
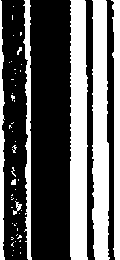
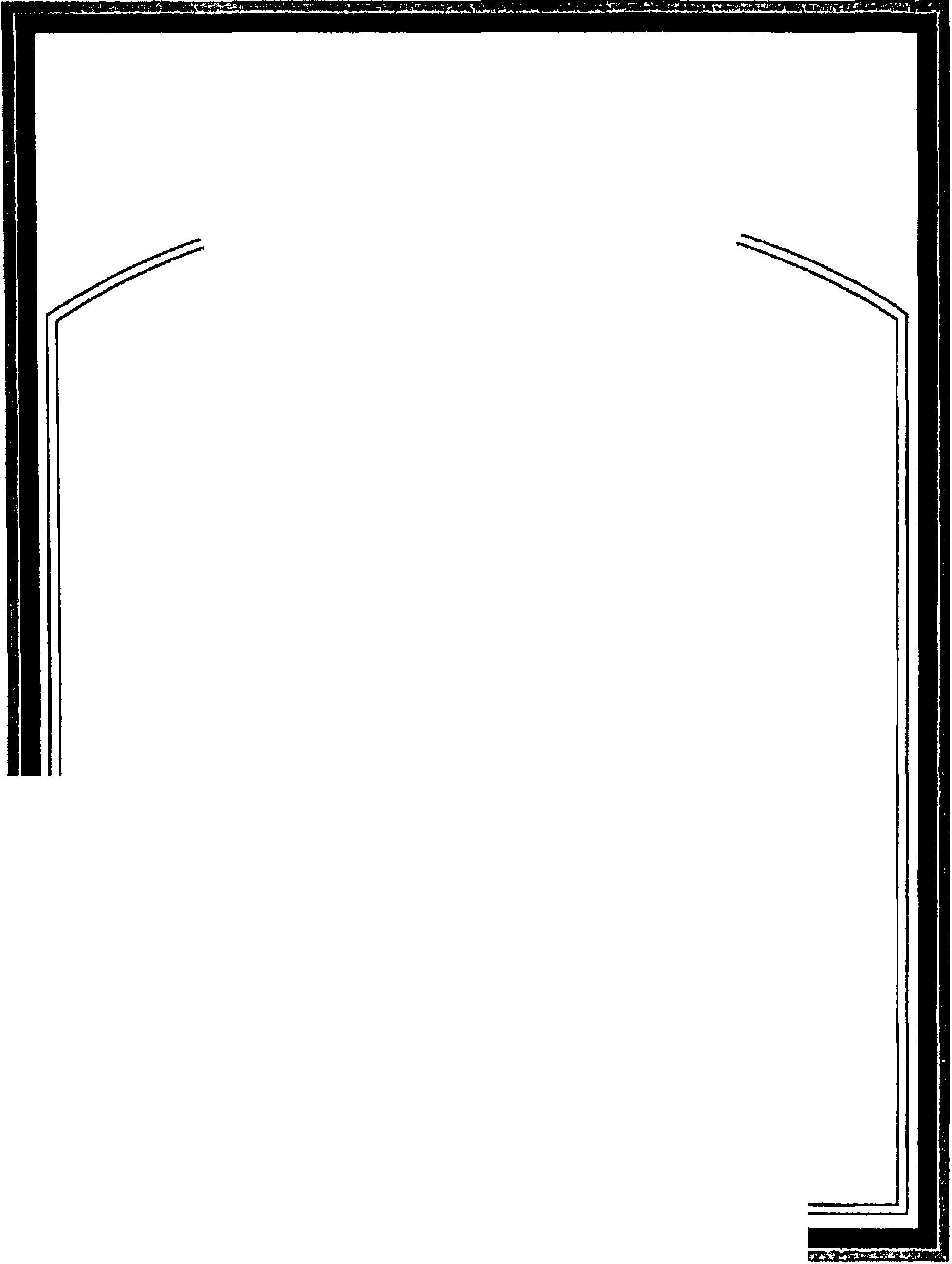
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## H&R Block Certificate of Completion for Tax Update WST (2015 Filing Season)- B

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## H&R Block Certificate of Completion for Appointment Manager Course

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

In recognition of successfully completing

Appointment Manager

on December 27, 2014 with a score of 100 %

) Delivery **Method** : Self•Study

|  |  |  |
| --- | --- | --- |
| Ffeld of Study |  | Course Number: 00067006 |
| Federal Tax Law | 0 | CTEC **Number:** N.'A |
| Tax Update | 0 | **NASBA** Sponsorship ID: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

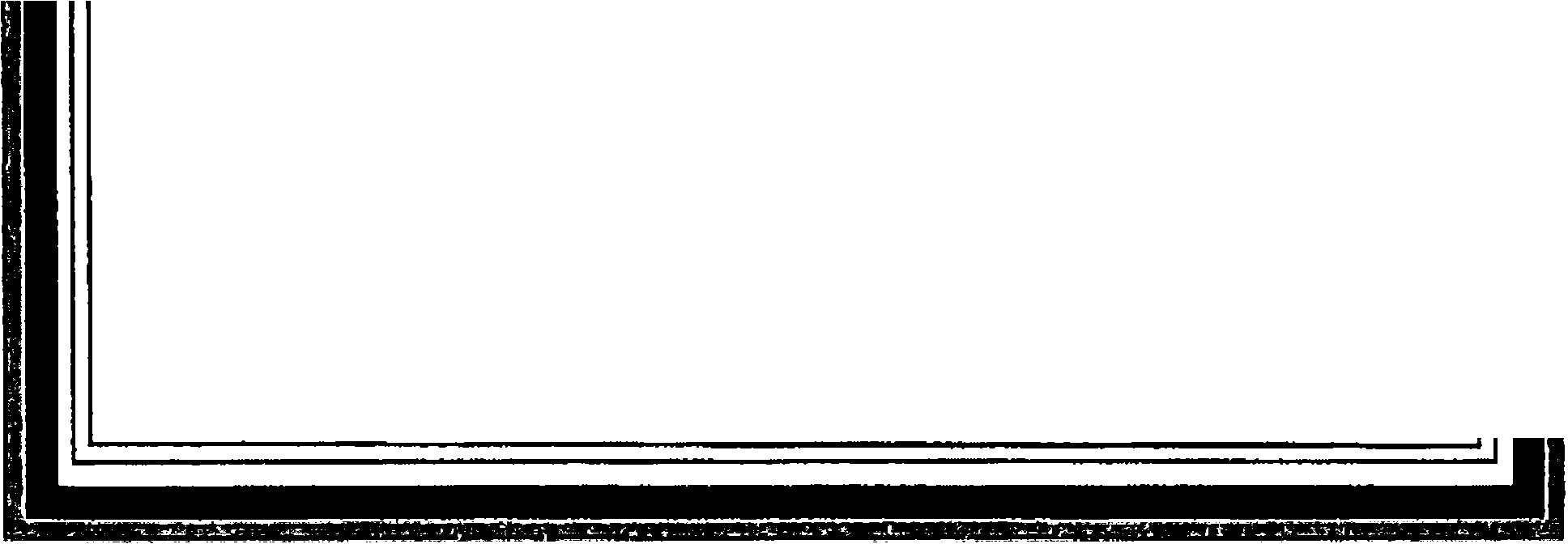
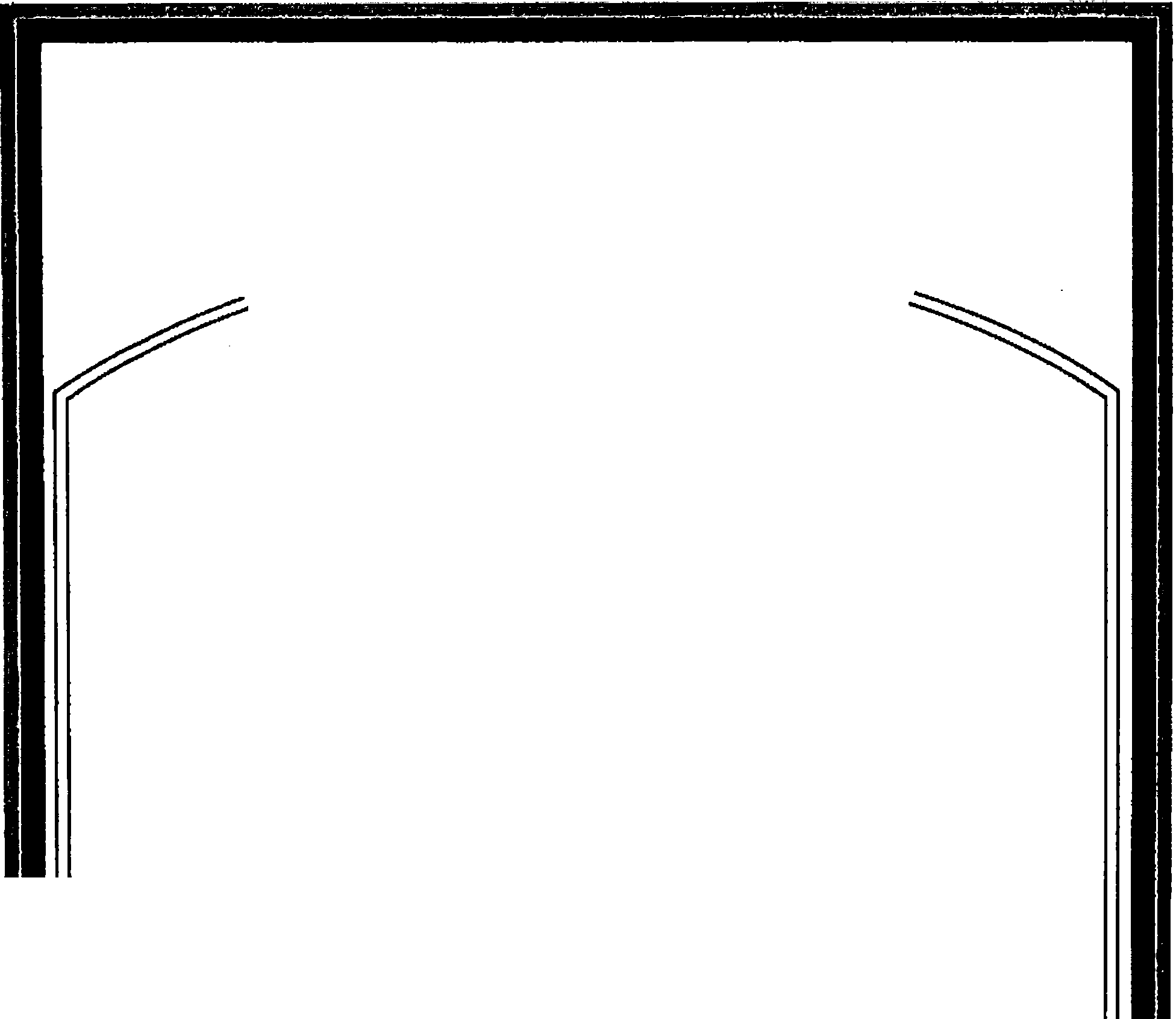
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One H&R Block Way, Kansas City MO 64105

In accordance with the **1tandard1** of the National Raglatry of CPE Sponaora, CPE c:redlta hava baen granted baaed on a &O•mlnute hour

## H&R Block Certificate of Completion for TP S2W Knowledge Check: Healthcare Client Experience

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

In recognition of successfully completing

TP S2W Knowledge Check: Healthcare Client Experience

) on December 27, 2014 with a score of 85 %

Delivery **Method** : Self-Study

|  |  |  |
| --- | --- | --- |
| Field of Study |  | Course Number: 00065148 |
| Federal Tax Law | 0 | CTEC Number: NIA |
| Tax Update | 0 | **NASBA** Sponsorship JD: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

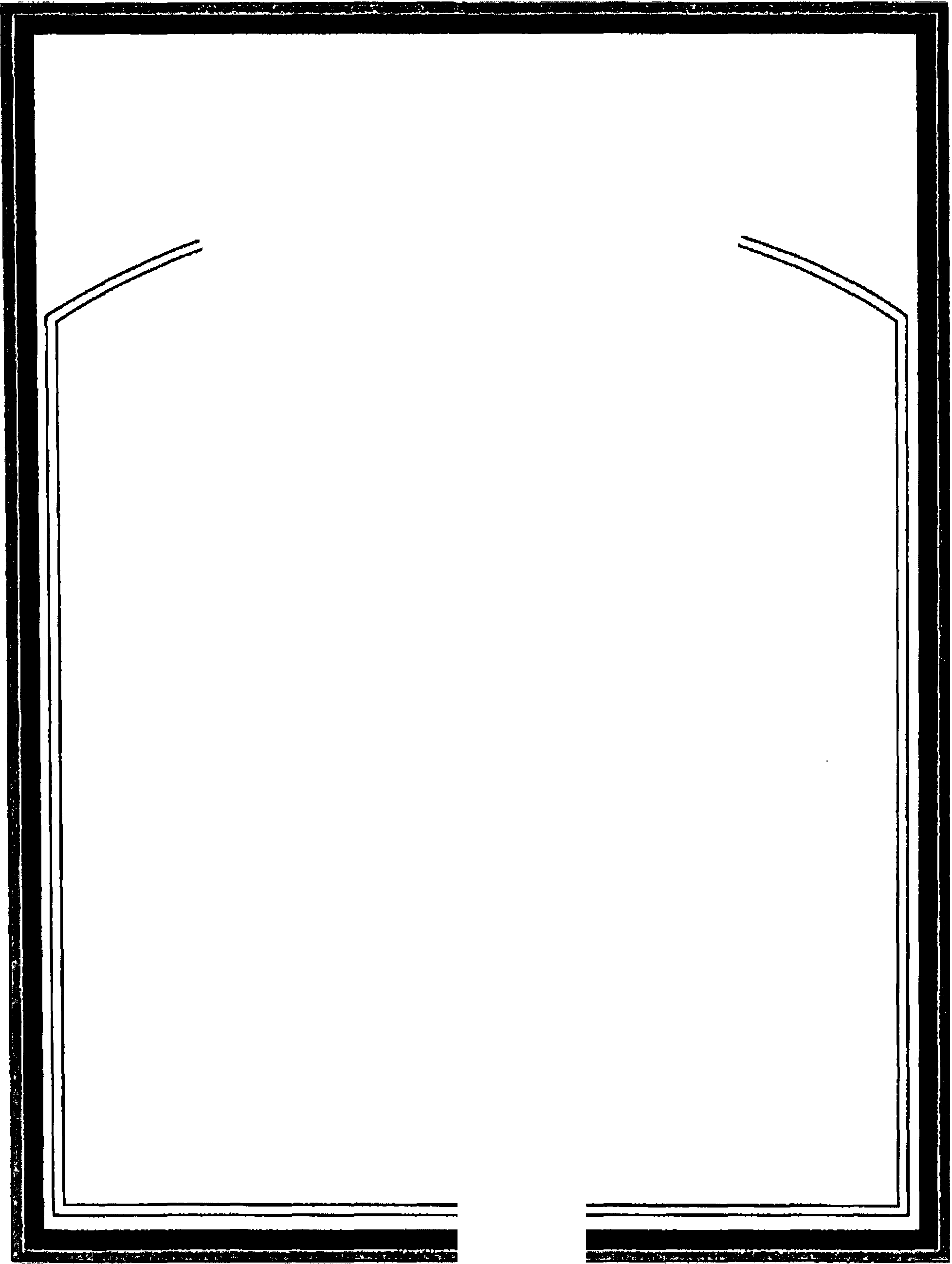
Chief l'eople Officer

One H&R Block Way, Kansas City MO 64105

In 1ccord1nce with the atand•rd• of the N1Uon1I R1gl1try of CPE Spon1or11 CPE cr1dltl hava baen grantad **b111d** on **1** &O•mlnute hour

## H&R Block Certificate of Completion for Course: TP S2W Knowledge Check-Delivering Tax Desk Excellence

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

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in recognition of successfully completing

TP S2W Knowledge Check: Delivering Tax Desk Excellence

) on December 27, 2014 with a score of 90 %

Delivery **Method** : Self-Study

|  |  |  |
| --- | --- | --- |
| Field of Study |  | Course Number: 00065167 |
| Federal Tax Law | 0 | CTEC **Number:** NIA |
| Tax Update | 0 | **NASBA** Sponsorship ID: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

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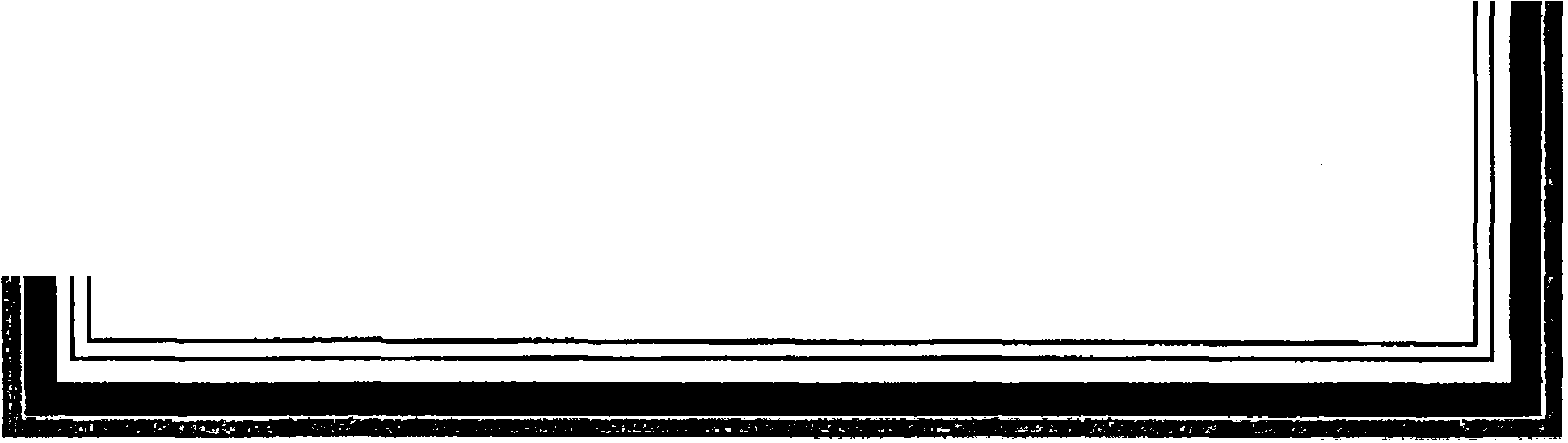
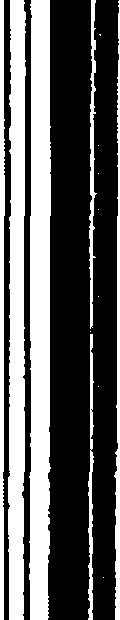
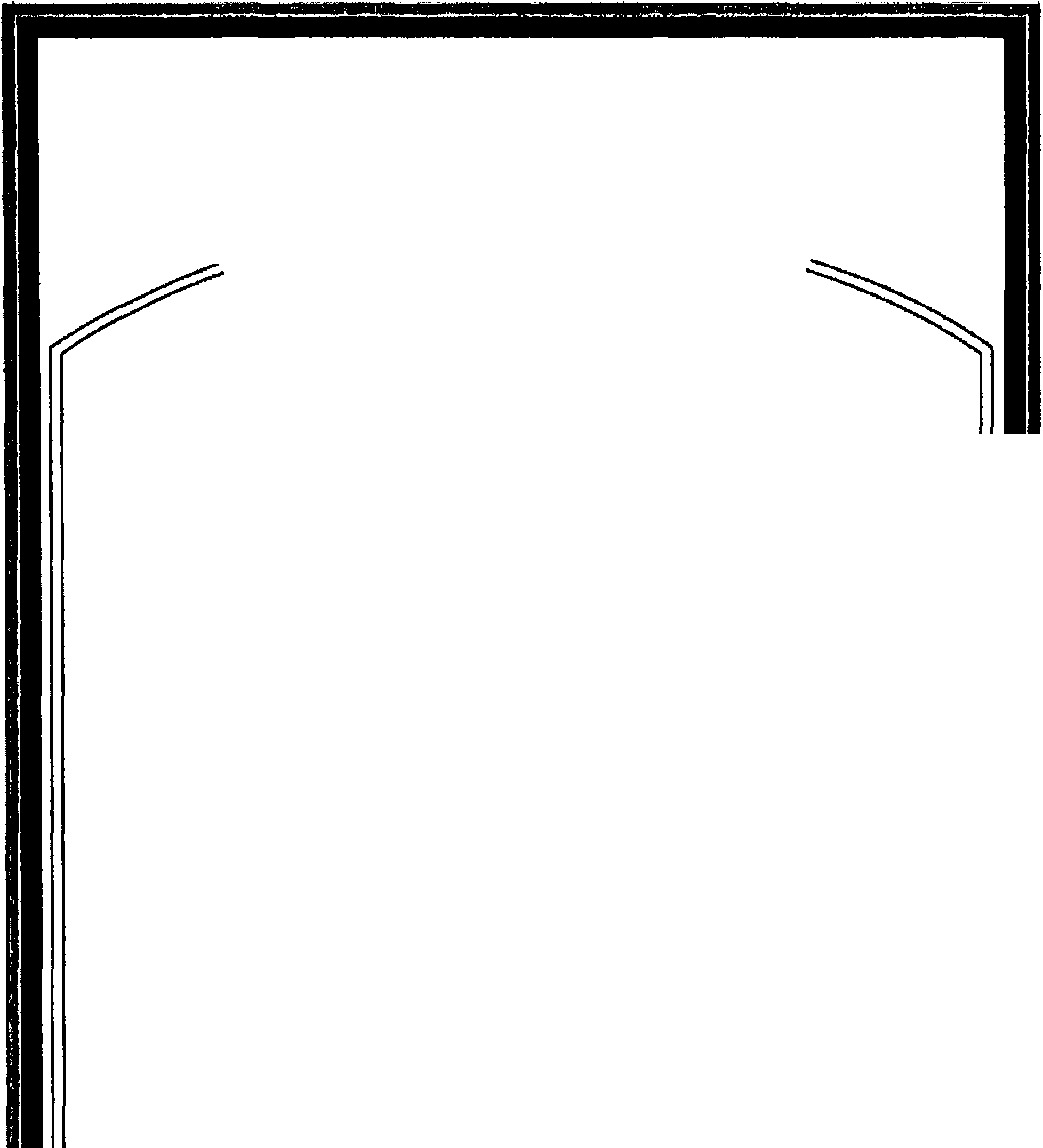
One H&R Block Way, Kansas City M064105

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## H&R Block Certificate of Completion for Course: FYTP S2W Knowledge Check—Additional Products Services

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

In recognition of successfully completing

FYTP S2W Knowledge Check: Additional Products Services

) on December 27, 2014 with a score of 90 %

Delivery **Method** : Self-Study

|  |  |  |
| --- | --- | --- |
| Field of Study |  | Course Number: 00065141 |
| Federal Tax Law | 0 | CTEC **Number:** NIA |
| Tax Update | 0 | **NASBA Sponsorship** ID: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

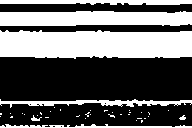
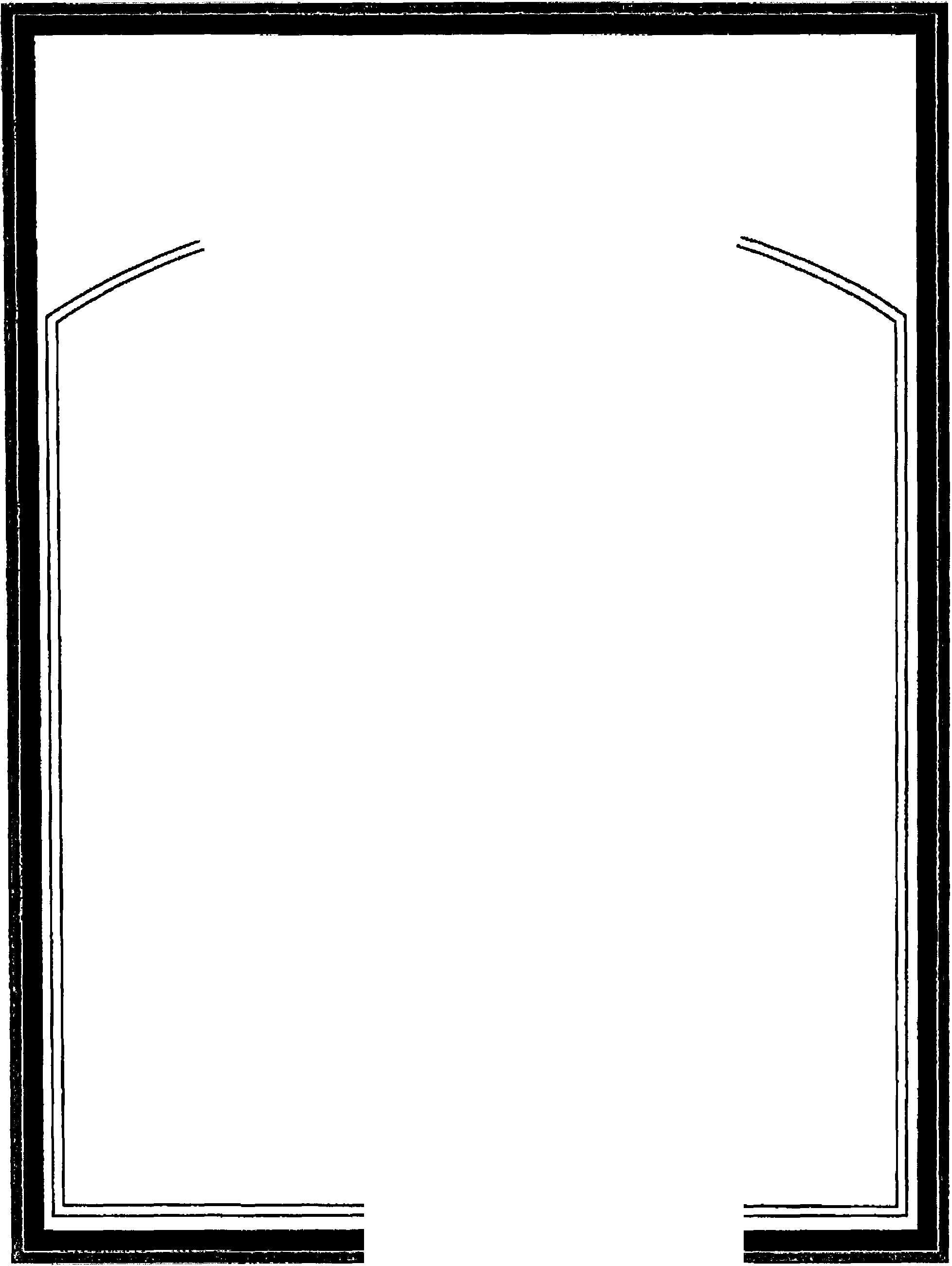
Chief **P'l!ople Offim**

One H&R Block Way, Kansas City MO 64105

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## H&R Block Certificate of Completion for Course: Bank Agency Training- Tax Season 2015

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

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In recognition of successfully completing

Bank Agency Training - Tax Season 2015

on December 27, 2014 with a score of 80 %

) Delivery **Method** : Self-Study

|  |  |  |
| --- | --- | --- |
| Field of Study |  | Course Number: 00065166 |
| Federal Tax Law | 0 | CTEC Number: NIA |
| Tax Update | 0 | NASBA Sponsorship 10: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

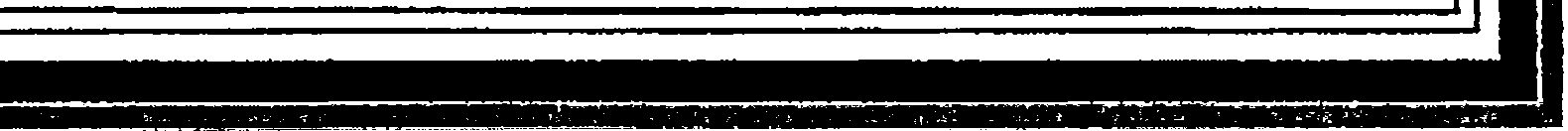
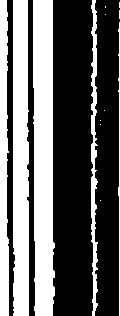
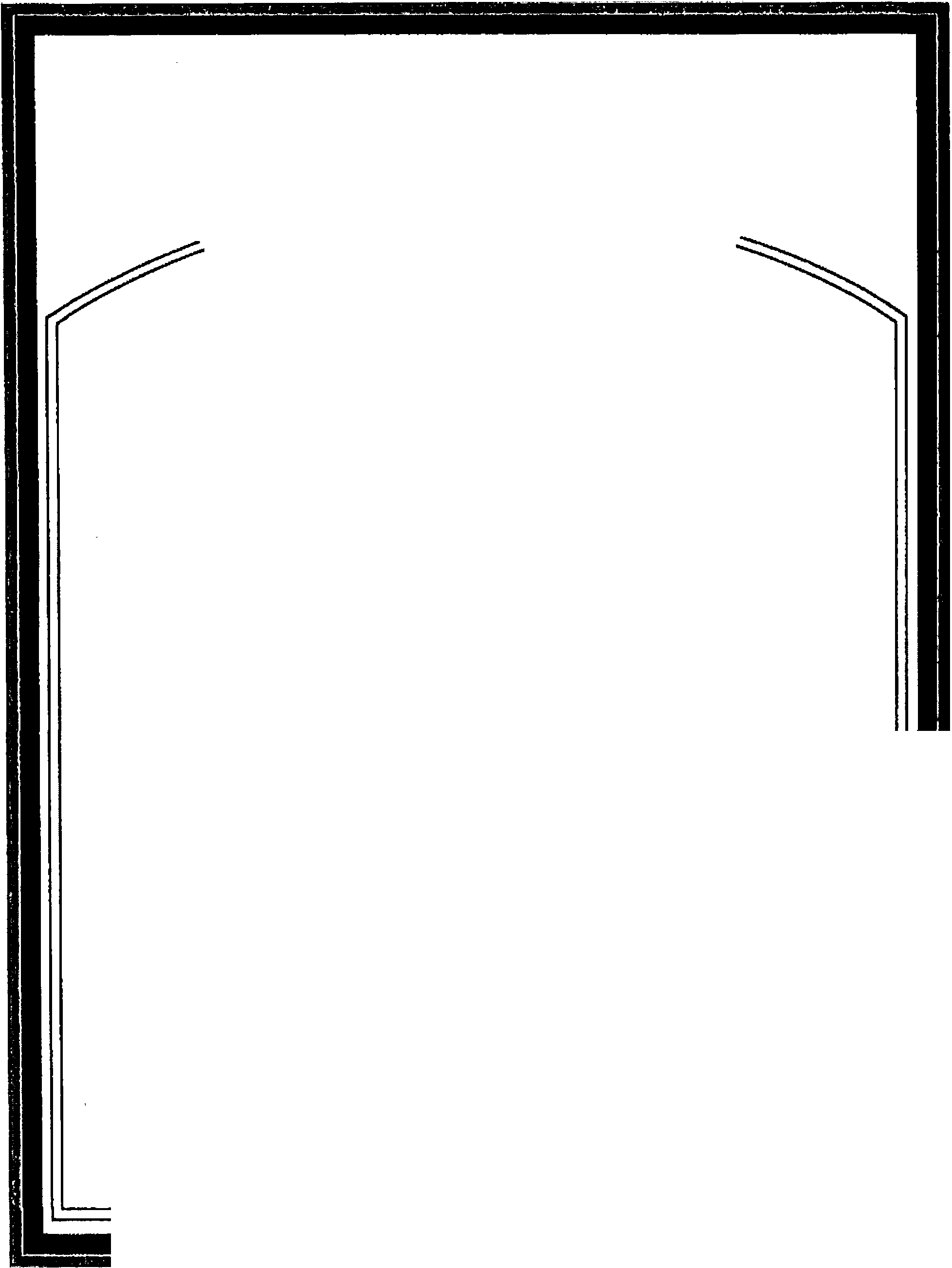
Chief l'llopie Officer

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

In accordance with the **1tlndard1** of the National R11gl1try of CPE Spon1ora, CPE cr11dltl **have** been granted b11ed on **a** 50-mlnuta hour

## H&R Block Certificate of Completion TP S2W Healthcare Law: Tax Season 2015

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H&R Block hereby authorizes and awards

H&R Block CPE Hours: 0 CTEC CPE Hours: 0

In recognition of successfully completing

TP S2W Healthcare Law: Tax Season

2015

) on December 27, 2014 with a score of 84 %

Delivery **Method** : Self-Study

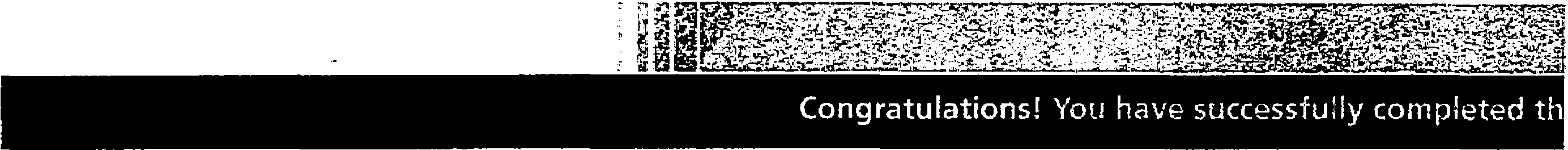
|  |  |  |
| --- | --- | --- |
| Field of Study |  | Course Number: 00065147 |
| Federal Tax Law | 0 | CTEC Number: NIA |
| Tax Update | 0 | **NASBA** Sponsorship JD: |
| Ethics | 0 | Federal Course ID: |
| State | 0 | Federal Sponsorship ID: |

Chief People Officer

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## Congratulations on Passing the Final Exam for Skills to Win at H&R Block with Score of 100%

Congratulations Screen Page I of I



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**H&R BLOCK"**

Congratulations, you have passed the final exam!

Your score of 100 % is terrific and shows you mastered the ma.terial we presented in the course.

--

**Evaluations Reminder:**

Remember to complete your Skills to Win Evaluations. The evaluations provide valuable feedback for both the instructor and materials in your Skills to Win curriculum.

Tell us about your Skills to Win experience so we can continue to improve the learning programs we provide to get you ready for each s

To complete the TS15 End of Skills Survey, click the link below. [https://www.surveymonkey.com/s/TS1](http://www.surveymonkey.com/s/TS15EndofSkillsSurvey)5 End of [Skill](http://www.surveymonkey.com/s/TS15EndofSkillsSurvey)s [Survey](http://www.surveymonkey.com/s/TS15EndofSkillsSurvey)

Final Exam

Student, SCORE: 100% PASSED

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## H&R Block Final Exam Score Showing Score of 85% and “Passed” and questions that were incorrectly answered

Final Exam

Student:l SCORE: 85% PASSED

Question 2

Approximately\_ percent of H&R Block clients are expected to have a reconcifiation requirement or a penalty/exemption situation.

Your answer: 10%

Question 6

George and Lucinda enrolled in a Marketplace health plan in April of 2014, and received the Advance Tax Credit; their estimated household income at this time was $38,775. In May, In May, Lucy got a part-time job, raising their year-end household income to $46,530. Evaluate how this will impact their Marketplace health insurance

Your answer. This willnot impact their Marketplace insurance.

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## H&R Block Final Exam Page Showing score of 80% and “Passed” with questions that were answered incorrectly listed

Final Exam

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Student:! SCORE: 80% PASSED

Question 6

Select the correct order for the Tax Desk Protocol:

Your answer: Start Strong, Add the Tax Plus, Prepare the Tax Return, Finish Strong

Question 7

Tax identity theft is the same thing as identity theft. Your answer: True.

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## H&R Block Final Exam Page Showing score of 78% and “Passed” with questions that were answered incorrectly listed

Final Exarm

**Student**

SCORE: 78% FAILED

Question 1

Review the Office Calendar and answer the following question. (Click on it to enlarge) A "yellow" column indicates:

Your answer: Confirmed hours. Question 3

Review the Office Calendar and answer the following question. (Click on it to enlarge) An uSp" code indicates that a Tax Professional can:

Your answer: All of the above.

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## H&R Block Final Exam Page Showing score of 83% and “Passed” with questions that were answered incorrectly listed

Final Exarn

Student

SCORE: 83%

PASSED

Question 2

The beginning of a positive client experience starts at the: Your answer: All of the above.

Question 10

Choose the correct priority for client matching: Your answer: Best, Referred, Same.

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est Results https://hrbcompassc.sabanow.net/hrbcontent/cninv000000000009308/pagc:92714.html

## H&R Block Final Exam Page Showing score of 93% and “Passed” with questions that were answered incorrectly listed

Final Exa•

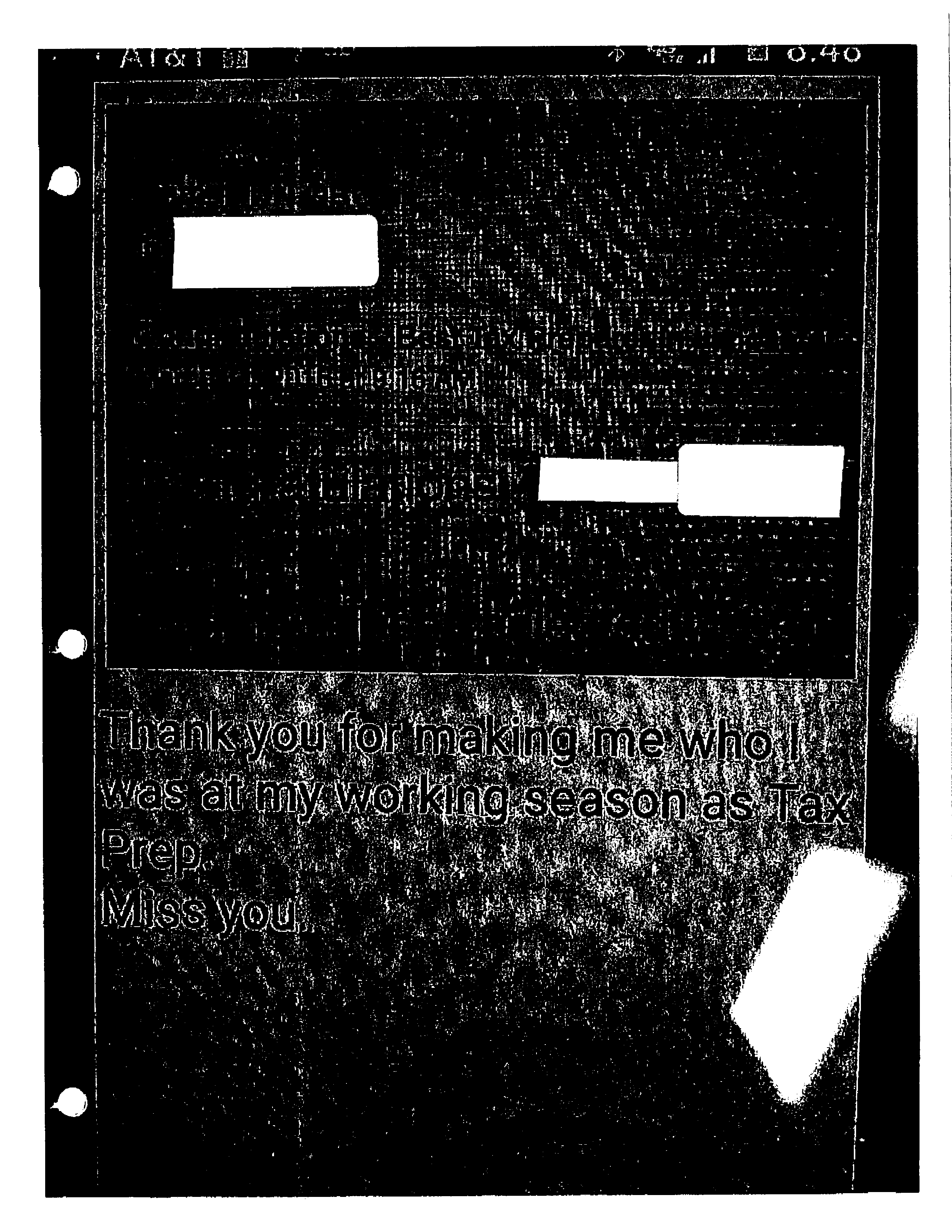
Student: / SCORE: 93% PASSED

Question 5

Which of the following is included in the definition of materials and suppfies as described in the tangible property regulations?

Your answer: Items consumed in 12 months or less.

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## This Page: Award for Best Tax Preparer in Lancaster from PTN.org

## Letter from Applicant Explaining Work History with H&R Block

To: Arny Stahl April 20, 2017

Re: Prior Learning Portfolio

During the Spring semester of 2015, I worked at the H&R Block Tax Preparation office located in Lancaster, Ohio. I had started my pursuit of a degree in Accounting Technology during Fall semester, 2014 and had taken one class in personal taxation. When I began the work at H&R Block, I felt as if I knew a lot about taxes, but soon learned that I still had a lot to understand and interpret regarding this field of accounting.

In order to be a tax return preparer, I had to go through a number of classes at the tax center. The classes focused on learning and understanding how to work with the company's tax preparation software. Additionally, the classes helped to deepen my understanding and interpretation of tax laws. Working with various clients in the office gave me a better understanding and appreciation for the ways that individuals interpret tax rules and I had to have much patience with many of the people who I prepared the tax returns for. Some would ask me to do things that I knew were not right and there were times that I had to suggest they go to a different company to get their tax return done. It was definitely a learning experience in dealing with people and their

expectations of what a tax person should or could do for them.

I enjoyed my work with the H&R Block company and was awarded the outstanding new tax preparer award for the region. It was quite an unexpected honor. Due to health complications, I have been unable to go back to H&R Block, but I would welcome the opportunity to do this as I felt my work brought further understanding to my tax knowledge and also to how humans react, expect, and interact.

Thank you.