

Training Your Advocates

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Agenda

- Who am I
- About H&R Block
- Changing Times
- Challenges in Corporations
- Advocate Training
- Final Thoughts



About Me

- City of Milwaukee
- OFCCP Compliance
- Capitol Hill
- H&R Block
 - Grassroots Certification
 - PAC Certification
 - Advocacy Leaders



About H&R Block

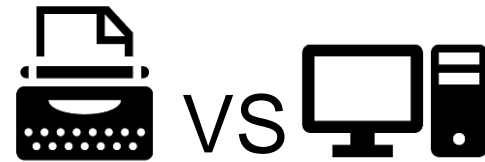
- Global consumer tax services provider, having prepared more than 750 million tax returns since 1955.
- Last year, Prepared 23.0 million tax returns worldwide, including 1 in every 7 U.S. tax returns. And, generated just over \$3.0 billion in revenue.

About H&R Block (Cont.)

- Tax return preparation services are provided in approximately 12,000 company-owned and franchise retail tax offices worldwide by professional tax preparers, and through H&R Block digital do-it-yourself products.
- H&R Block also offers affordable financial products and services to its clients.

Times are Changing

- Petitions
- Tear-off Post Cards
- Phone Banks
- Relationship Mapping
- Action Alerts
- Stories
- Meetings



Corporate Challenges

- Identifying Advocates 
- Corporate Stakeholders:
 - CEO Vision 
 - Marketing
 - Communications
- Strategic Lag Time 
- Resource Allocation

Training Advocates

- Newsletters
- Guides & How To
- Policy Papers & Issue Briefs
- In-person Training

Newsletters

- Then:



Newsletters

■ Then:



H&R Block representatives meet with U.S. Representative Lynn Jenkins. From left to right: Amy McElroy, Jeremy Sholtz, Carmen Rivera, Lynn Jenkins, Tim O'Leary, Jason Housheer, and Katie Ricketts.

H&R Block Supports IRS Announcement of Voluntary Certification for Tax Preparers



On June 26, IRS Commissioner John Koskinen announced that effective tax season 2015, the IRS plans to implement a voluntary certification program for the tax preparation industry.

H&R Block has been a leading advocate for minimum competency standards and backs the Commissioner's proposal. In a recent letter to Commissioner Koskinen, CEO and President Bill Cobb emphasized the importance of these standards as a necessary measure for consumer protection. "The most obvious way to protect consumers from incompetent and unethical tax return preparers, and to help them file more complete and accurate returns, is to establish a set of minimum standards," stated Cobb.

Since the registration program established by the IRS was struck down this past February by the D.C. Circuit Court, Block Brigade continues to advocate to our Members of Congress about the need to act to establish mandatory standards for professional tax preparers. Until Congress is able to act, however, a voluntary certification program is important for protecting consumers.

Nearly 60 percent of consumers use a professional tax return preparer to assist with, what for many is, the largest financial transaction of the year. H&R Block continues to stress the importance of greater consumer protection for taxpayers to assure that they are receiving reliable and competent assistance.

Visit the Brigade's Election Center for November Voting Information



With our country's Election Day on Tuesday, November 4 quickly approaching, Block Brigade is gearing up to educate our members about all their voting options. This fall on the [Block Brigade website's Election Center](#) you can access information about how to vote specific for your location.

This year is particularly notable because Election Day falls during the 2014 H&R Block Franchisees Convention in Dallas, Texas. Just because you may not be home to go to the polls on Election Day does not mean that you can't cast your ballot before Convention. States make available to you a variety of voting options -- from early voting in person to mailing in an absentee ballot.

Each jurisdiction has different rules -- so check out the [Election Center](#) and learn about the requirements and deadlines that apply in your home town. Once you're on the site, enter your zip code, click "Go" and select "Vote Early" on the next page. Most deadlines to request an absentee ballot occur in October. On the site, you can also find out about the candidates that will appear on your ballot and other election-related information.

If your voice matters on November 4, to make sure your vote counts, stop by the [Election Center](#) today.

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It's A Little Known DC Fact: The newly released Tax Cuts and Jobs Act is 429 pages. The Tax Reform Act of 1986, the last major tax reform passed by Congress, was 879 pages when it became law.

House Republicans released their tax reform bill yesterday. The legislative text of the *Tax Cuts and Jobs Act* can be found [here](#). The House Ways & Means Committee also released a section-by-section summary that can be read [here](#).

We are reviewing the legislation and will monitor updates as the legislation continues to take shape.

In other news, President Trump announced last week that David Kautter will become acting Commissioner of the IRS effective November 13th. Currently, Kautter serves as the Assistant Secretary of the Treasury for Tax Policy.

Before joining Treasury, Kautter worked at Ernst & Young and RSM US LLP, and taught at American University's Kogod School of Business. Kautter was also a former member of the AICPA Tax Executive Committee. He earned a J.D. from the Georgetown University Law Center and a Bachelor of Business Administration from Notre Dame.

Kautter will replace John Koskinen whose term expires on November 12th. Koskinen has served as IRS Commissioner since December of 2013.

If you have any questions or comments, please contact us at BlockBrigade@hrblock.com.

Sincerely,

H&R Block Government Relations Team

Guides & How To

- Guides

Guides

■ Guides

Tips on Writing to Congress



H&R
BLOCK

As experts in the tax preparation industry, no one is better qualified than you to educate your representatives in government on the key policy issues that you face. Your elected officials value your opinion and take it into account when making decisions. In fact, a survey of congressional offices by the Congressional Management Foundation shows that emails, meetings, and phone calls from constituents have great influence, often more so than a professional lobbyist.

One of the easiest and quickest ways to get in touch with your federal representative to express your views and concerns is to write him or her a letter. Writing to your members of Congress is not as hard or time consuming as you might think. Below are some helpful guidelines to follow.

Letter Content

- **Personalize.** When you have the time, it is best to write your own message from top to bottom. You can copy out ideas or statistics from a form letter, but try to paraphrase and make it more personal. Lawmakers want to know from their constituents the impact a law will have on them and their personal experience with the topic. So a well thought out personal letter is one of the most effective ways Americans have influence. Moreover, because representatives receive relatively few personal letters, your representative will notice that you took the time to share the details and stories of your situation.
- **Identify yourself as a constituent.** The best way to guarantee that your communication will be effective is to make sure the receiving office instantly can identify you as a constituent. Start each communication with your name and address at the very top. Provide details of where your business is located if it is also in the district or state.
- **One-page letters are ideal.** Because members of Congress receive much mail, keep your comments brief and to the point.
- **Know your issue!** Do your research. Request documents from H&R Block Government Relations that provide background information on an issue.
- **Don't Overstate.** Avoid overstating the issue and the impact. Exaggerating your case will only discount your effectiveness.

What communication method is best for sending your letter?

There are several viewpoints on what is the most effective way to send a letter.

- **Postal Mail.** The most personal method - and thus often the most effective approach - is a typed out or hand-addressed letter sent through the postal mail. However, if you send your letter through the U.S. Postal Service, due to security reasons all mail sent to congressional offices is delayed so the contents can be scanned for hazardous materials and toxins. This delay can take as long as a month to process. Those that prefer this method say that even if it takes longer for a letter to be received by the representative's office, it reflects the effort taken by the constituent and that holds a lot of weight.
- **Email.** In this digital age, the most common way to send your letter is to email your representative. Each representative's website will have a way to contact the office via an email address or increasingly via an online contact form on his or her website. Email is preferred when speed, ease, or volume of communications to the member of Congress is a priority. An email is far easier to process and will ensure that your message arrives more quickly, so email is preferable when you want to influence a vote or a decision quickly.

Finding your representative's postal address and/or online contact form

- The most accurate address or online contact form for your members of Congress can be attained by going to their websites, which for House members can be found at <http://www.house.gov/representatives/find/> and for Senators at <http://www.senate.gov/senators/contact/>

Guides & How To

- Guides
- Other Resources



Policy Papers & Issue Briefs

- 1-Pagers

Policy R

■ 1-Pagers



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PARTNERING WITH IRS ON STOLEN IDENTITY REFUND FRAUD

Stolen Identity Refund Fraud (SIRF)

- Stolen identity refund fraud (SIRF) occurs when personally identifiable information is stolen and then used by criminals to file fraudulent returns for refunds.
- SIRF places an enormous burden on the entire tax ecosystem. The most painful and immediate impact is on the victims whose personal information is compromised. It also has an impact on government programs established to serve the public whose funds are stolen fraudulently.
- Combating SIRF requires collaboration between private industry and government as today's identity thieves constantly adapt their tactics for both stealing and using others' personal information, making detection and prevention a constant challenge.

Security Summit with the Internal Revenue Service and State Departments of Revenue

- Beginning in March of 2015, the IRS, various state departments of revenue and the tax industry began a public-private partnership, titled the Security Summit, focused on prevention, detection, and victim assistance of SIRF within the tax system.
- Initially, the Security Summit created seven working groups meant to focus on particular areas of concern around detection and prevention of SIRF: Authentication, Information Sharing, Strategic Threat Assessment and Response (STAR), Financial Services, Communications and Taxpayer Awareness, Information Sharing and Analysis Center (ISAC), and Tax Professionals.
 - Progress has been made with changes beginning in tax season 2016 and continuing in tax season 2017. For example, as an additional level of authentication, many states request each taxpayer's email address and driver's license information.

H&R Block Leading the Way

- H&R Block is heavily involved in each working group, is the industry leader of the ISAC working group, and industry co-leader for the STAR group.
- We believe that our products and professionals set a high standard for tax preparation. We recognize our role in not simply identifying fraud, but working to prevent it. Therefore, we will continue to innovate new solutions to help taxpayers safely file their taxes including developing new products or services that are centered on protecting, restoring, and securing our clients' identities.
- Even with the large amount of effort applied over the last two years, the constant adaptation by criminals makes SIRF an ongoing threat to our clients, industry, and our country. Thus, we are committed to continuing our engagement in this fight.

Policy Papers & Issue Briefs

- 1-Pagers
- Who We Are



H&R Block is a global consumer tax services provider, preparing about 1 in every 7 U.S. tax returns.

More than 700 million tax returns have been prepared in retail tax offices and through H&R Block tax software products since 1955. Our tax professionals, who on average have 10 years' experience, are typically required to complete a 60-hour Income Tax Course on tax law before even being considered for hire.



Over 10,000 company-owned and franchise locations in all 50 states, Puerto Rico and other U.S. territories.



6 in 10 taxpayers can file using our FREE online tax preparation.



With nearly 300 offices, Block Advisors offers tax preparation, planning and business services through dedicated, year-round experts whose average experience is 15 years.



Multi-cultural

With more than 11,600 bilingual associates and 1,400 latino designated offices, H&R Block is a leader in providing tax preparation services to Spanish-speaking tax payers.



Military focused

Co-founded by a WWII veteran, H&R Block has more than 100 tax offices on or near military installations in the United States and abroad.

- Each year H&R Block provides \$15 million in scholarships to military spouses to take our Income Tax Course as part of the Military Spouse Employment Program.
- 1 in 4 Active Duty, Active Reserve and Dept. of Defense employees file their tax return with H&R Block.



Community

H&R Block Dollars & Sense, our commitment to increasing teens' financial literacy, provides college scholarships and free educational resources to high schools covering topics like budgeting, saving, spending, credit cards and student loans.



In your state

State Xth District

OFFICES STATEWIDE

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FRANCHISE OFFICES IN THE STATE

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FRANCHISE OFFICES IN YOUR DISTRICT

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TAX PROFESSIONALS

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BILINGUAL TAX PROFESSIONALS

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SCHOOLS RECEIVING FREE CURRICULUM

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SCHOLARSHIP DOLLARS AWARD IN THE STATE

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THE TAX
INSTITUTE
AT H&R BLOCK

The Tax Institute is H&R Block's center of tax expertise staffed by highly experienced tax attorneys, CPAs and enrolled agents. This team analyzes the constantly changing federal and state tax laws to understand and communicate the impact these policies have on individual tax payers. When leading publications need analysis on tax issues, they turn to our Tax Institute for answers.

thetaxinstitute.com



The H&R Block
Emerald Prepaid
Mastercard®

We provide clients with access to financial products and services that they can use year round like the H&R Block Emerald Card®.

Cardholders can put their tax refund directly on their Card and use it anywhere Debit Mastercard® is accepted.

The H&R Block Emerald Prepaid Mastercard® is a tax refund-related deposit product issued by Boff Federal Bank, Member FDIC, pursuant to a license by MasterCard International Incorporated. Emerald Financial Services, LLC is a registered agent of Boff Federal Bank. MasterCard is a registered trademark of MasterCard International Incorporated. Not available at all locations and to all applicants. Additional fees, terms and conditions apply; consult your Cardholder Agreement for details. ID verification required.

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In-Person Training

- Fly-In

- In-District 



BlockBrigade.com

- Accessible
 - Learn
 - Join
 - Act
- Interactive
 - Stories
 - Relationships
 - Gallery



Final Thoughts

- Identify



- Seek Approvals



- Build Momentum



- Curate and Maintain

