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returns, AI algorithms, and generative AI technology.

Isaac M. O'Bannon • Jun. 22, 2023



H&R Block announces it is partnering with Microsoft to leverage its Azure OpenAI services and leading generative AI technology to build faster and more consultative tax experiences, unleashing higher levels of innovation to inspire even more confidence in Block customers at tax time.

“Every year, millions of Americans turn to H&R Block for the unique expertise, help, and financial confidence that only we provide,” said Alan Lowden, H&R Block Chief Information Officer. “Now we are coupling our unmatched tax expertise with groundbreaking technology from OpenAI and Microsoft to drive even better customer experiences.”

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AI technology boosts productivity and unleashes the innovation of H&R Block's engineers to deliver new solutions designed to provide more dynamic, humanized, and personalized product experiences at scale. Thousands of machine learning models trained with millions of tax returns, AI algorithms, and generative AI technology together will be key drivers in developing more robust real-time advice, and more efficient filing processes.

“We are excited to partner with H&R Block and see our Azure OpenAI Service come to life to solve the complexities of preparing taxes,” said Zia Mansoor, Vice President, Data & AI, Microsoft. “With AI, H&R Block will be able to provide innovative solutions to help people at the critical financial moment of tax time — all in a safe and secure AI environment.”

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