

**UNITED STATES OF AMERICA  
BEFORE THE FEDERAL TRADE COMMISSION  
OFFICE OF THE ADMINISTRATIVE LAW JUDGES**

**In the matter of**

**H&R BLOCK INC.,**  
a corporation,

**HRB DIGITAL LLC,**  
a limited liability company, and

**HRB TAX GROUP, INC.,**  
a corporation.

**DOCKET NO. 9427**

**SECOND JOINT STATUS REPORT**

Pursuant to the Scheduling Order, Complaint Counsel and counsel for H&R Block, Inc., HRB Digital LLC, and HRB Tax Group, Inc. (“Respondents”) submit this Second Joint Status Report setting forth the expert discovery schedule and requesting a telephonic pre-trial hearing to discuss trial logistics. Complaint Counsel notes for the Court’s awareness that Respondents have retained an expert, Ron Schnell, with whom Judge Himes authored the 2021 article, “Antitrust Enforcement and Big Tech: After the Remedy Is Ordered.” 1 Stanford Computational Antitrust 64 (2021). Both Complaint Counsel and counsel for the Respondents have no reason to believe that Judge Himes’s co-authorship of this publication will impair his judicial impartiality.

**I. Expert Discovery Schedule**

<b>Expert Witnesses</b>		
<b>Proponent</b>	<b>Expert Name</b>	<b>Deposition Date</b>
Complaint Counsel	Youssef Benzarti, Ph.D. University of California, Santa Barbara	September 18, 2024
Complaint Counsel	Harry Brignull, Ph.D. Testimonium Ltd.	September 13, 2024
Complaint Counsel	Sarah Butler, M.A. National Economic Research Associates	September 17, 2024
Complaint Counsel	Rick Watts, J.D. Quandary Peak Research	September 16, 2024
Respondents	Christopher Gerardi, M.S. Charles River Associates	September 19, 2024
Respondents	Kenneth Hines, M.A. Integritas <sup>3</sup>	September 10, 2024
Respondents	Punam A. Keller, Ph.D. Tuck School of Business, Dartmouth College	September 12, 2024
Respondents	Ron Schnell, M.S. Berkeley Research Group	September 20, 2024

Respondents	Itamar Simonson, Ph.D. Graduate School of Business, Stanford University	September 11, 2024
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**II. Joint Request for Pre-Trial Conference**

Complaint Counsel and counsel for Respondents respectfully request a telephonic pre-trial conference with the Court to discuss trial logistics. If convenient to the Court, the parties respectfully request this pre-trial conference be held the week of September 3 to ensure that out-of-town attorneys and witnesses have sufficient time to make travel and lodging arrangements for trial.

Respectfully submitted,

Dated: August 28, 2024

/s/ Simon Barth

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*Counsel Supporting the Complaint  
Federal Trade Commission*

Dated: August 28, 2024

Respectfully submitted,

*/s/ Antonio F. Dias*

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*Attorneys for Respondents, H&R Block, Inc., HRB Digital LLC, and HRB Tax Group, Inc.*

### CERTIFICATE OF SERVICE

I hereby certify that on August 28, 2024, I filed the foregoing document electronically using the FTC E-File system, and sent courtesy copies of such filing to:

April Tabor  
Office of the Secretary  
Federal Trade Commission  
600 Pennsylvania Avenue NW  
Suite CC-5610  
Washington, DC 20580  
ElectronicFilings@ftc.gov

The Honorable Jay L. Himes  
600 Pennsylvania Avenue NW  
Room H-110  
Washington, DC 20580

I hereby certify that on August 28, 2024, I caused the foregoing document to be served via email on:

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/s/ Simon Barth  
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