

# Charleston-Hilton Head Island

South Carolina

Included counties: Beaufort, Berkeley, Charleston, Dorchester, Jasper

January 1, 2024, update bankofamerica.com/local





181K

Digital active clients1



Financial centers



**ATMs** 



Merrill® offices



Bank of America Private Bank offices

# **Business lending**

Small business



\$100 million Loans to small business

Credit extended to businesses that generally have annual revenues of less than \$5 million.

#### Commercial business



\$402 million

Loans to commercial business

Credit extended to businesses that generally have annual revenues of \$5 million to \$2 billion.

# Personal banking and investing



\$4.2 billion Total FDIC deposits\*

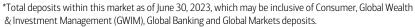
\$143 million



\$2.6 billion Bank of America Private Bank client balances\*\*



\$9.3 billion Merrill client balances\*\*\*



\*\*Home loan dollars reflect a rolling 12-month total of first mortgage loan production figures including Consumer Banking and GWIM.

#### The power of local connections

At Bank of America, we have leading capabilities across all our businesses and a strategy that is focused on connecting our capabilities to deliver for our customers and clients. In every situation, we're committed to growing responsibly and sustainably - ensuring everything we do aligns to our purpose of helping people live better financial

- Families can have the tools and support they need to live more successful financial lives.
- · Neighborhoods can be built on a solid foundation of responsible home lending and economic development.
- · Businesses, small and large, can benefit from our financial and intellectual capital.
- And the organizations, nonprofits and companies addressing society's toughest problems can have the resources and expertise of the company and the efforts of our over 200,000 employees behind them.

In each market, we strive to connect everything our company offers to our clients' personal and financial goals so we can provide tailored solutions to fit their needs. It's how we make this large company personal and how we help our customers, clients and communities thrive.

# Community support

#### Grants and matching gifts<sup>2</sup> (since 2019)



\$4.0 million

Advancing economic mobility in the communities we serve, including creating opportunities for people of color. The Bank of America Charitable Foundation provides grants and matching gifts on behalf of employees.2

### Community partners

Local nonprofit organizations are critical in creating economically and socially vibrant communities. Our partnerships with local nonprofits help to address important community needs through grant funding, volunteerism, and matching gifts.

Employee giving and volunteerism<sup>2</sup> (since 2019)



\$651K

Total contribution by employees donated to local nonprofits and community needs. A portion of this amount was matched by the Bank of America Charitable



30K hours

Employee volunteers give their time to support people and communities who need us most, contributing two million volunteer hours annually. #BofAVolunteers

Turn90

Samuel M.(Mark) Munn

President, Charleston-Hilton Head Island (mark.munn@bofa.com)

Patrick J. Kelly

Market Executive (patrick.j.kelly@bofa.com)

<sup>\*\*\*</sup>Global Wealth and Investment Management (GWIM), the wealth and investment management division of Bank of America, includes Bank of America Private Bank and Merrill. GWIM Client Balances consists of assets under management of GWIM entities, brokerage assets, and assets in custody of GWIM entities.

Carolina Youth Development Center

<sup>&</sup>lt;sup>1</sup> Digital active users represents mobile and/or online 90-day active users.

<sup>&</sup>lt;sup>2</sup>Community support amounts represent a cumulative five-year period of contributions; 20 quarters from fact-sheet date.