

# Montana

bankofamerica.com/montana



## At Bank of America, our heritage is in our name.

### 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 lives.

- 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.



1 ATM



4 Merrill Lynch® offices

### Commercial business



**\$213 Million**

Loans to commercial business

### Helping Montana business grow



**\$44 Million**

Credit provided by Bank of America to small businesses in Montana

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



**\$111 Million**  
Home loans\*\*



**\$2.8 Billion**  
Merrill Lynch client balances\*\*\*

\*\* Home loan dollars reflect a rolling 12 month total of First mortgage loan production figures including Consumer Banking and GWIM.  
\*\*\*Global Wealth and Investment Management (GWIM), the wealth and investment management division of Bank of America, includes U.S. Trust and Merrill Lynch. GWIM Client Balances consists of assets under management of GWIM entities, brokerage assets, and assets in custody of GWIM entities.

### Community involvement

#### Grants and matching gifts<sup>1</sup> (since 2013)



**\$336K**

Amount of grants and matching gifts we provided, through the Bank of America Charitable Foundation, to support local nonprofits addressing economic mobility and community needs.<sup>1</sup>

#### Employee giving and volunteerism<sup>1</sup> (since 2013)



**\$383K**

Total contribution by employees pledged to local nonprofits and community needs. A portion of this amount was matched by the Bank of America Charitable Foundation.<sup>2</sup>



**3.5K hours**

Employee volunteer hours contributed locally as part of our annual goal of giving 2 million volunteer hours across the company.

**#BofAVolunteer**

<sup>1</sup>Community involvement amounts represent a cumulative 5 year period of contributions; twenty quarters from fact sheet date.

<sup>2</sup>Employee local nonprofit pledges may include: disaster relief, deceased/retirement dollars, volunteer grants and volunteer service awards.

#### \$125 Billion environmental business



We have increased our current environmental business initiative from \$50 billion to \$125 billion in low-carbon business by 2025 through lending, investing, capital raising, advisory services and developing financing solutions for clients around the world. We have provided more than \$70 billion in financing for low-carbon activities since 2007.

In Montana, we've provided \$15 Million since 2007 in financing for renewable energy, energy and water efficiency, and related natural resource solutions.