BANK OF AMERICA 🥟

Southwest Florida

Included counties: Collier, Lee

January 1, 2025, update

bankofamerica.com/southwestflorida



264K

Digital active clients1



ATMs

Merrill® offices

Bank of America Private Bank offices

Business lending

Small business



\$154 million Loans to small business

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

Commercial business



\$839 million

Loans to commercial business

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

Personal banking and investing



\$5.8 billion Total FDIC deposits*

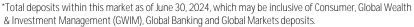
\$169 million



\$2.7 billion Bank of America Private Bank



\$16 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 nonprofit organizations can have access to the resources and expertise of the company and the efforts of our employees locally and around the globe.

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 gifts² (since 2020)



\$3.7 million

Sharing our success with our communities is part of our culture. The Bank of America Charitable Foundation provides grants and matching gifts on behalf of employees to support the causes they care about.²

Community partners

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

- Boys & Girls Club, Champions for Learning, Community Co-op, FGCU, FDN Lee Co Schools, FSW, FutureMakers, Grace Place, Junior Achievement
- Habitat for Humanity, IFHA, Lee Health, Meals of Hope, Project Dentists Care, Shelter for Abused Women, St. Matthews House, United Way

Employee giving and volunteerism² (since 2020)



\$386K

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. In 2024, more than 50% of our workforce volunteered, our highest participation to date. #BofAVolunteers

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^{***}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.

¹ Digital active users represents mobile and/or online 90-day active users.

²Community support amounts represent a cumulative five-year period of contributions; 20 quarters from fact-sheet date.