

# Napa, Marin & Sonoma

California

Included counties: Marin, Napa, Sonoma

January 1, 2025, update bankofamerica.com/northbay



167K

Digital active clients<sup>1</sup>



16

Financial centers



63 ATMs



Merrill® offices



Bank of America Private Bank office

## **Business lending**

#### Small business



\$138 million

Loans to small business

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

#### Commercial business



\$670 million

Loans to commercial business

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

#### Commercial business

## Credit extended to businesses that generally

## Personal banking and investing



\$5.2 billion
Total FDIC deposits\*

\$189 million

Home loans\*\*

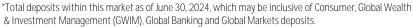


\$967 million
Bank of America Private Bank client balances\*\*\*



\$11 billion

Merrill client balances\*\*\*



<sup>\*\*</sup>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 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 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 gifts<sup>2</sup> (since 2020)



\$4.0 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.<sup>2</sup>

#### 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.

## Employee giving and volunteerism<sup>2</sup> (since 2020)



\$885K

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



20K 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

Boys & Girls Clubs of Sonoma-Marin

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<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.

Canal Alliance

<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.