



William Jarvis
Managing Director
Philanthropic Executive, Strategy & Delivery

203.407.9687
william_jarvis@bofa.com

1 GORHAM IS
WESTPORT, CT 06880

William Jarvis is Managing Director and Philanthropic Executive at Bank of America Private Bank, where he heads strategic thought leadership for institutional and private nonprofit organizations. An authority on investment policy and governance for endowed nonprofit organizations, Bill brings 42 years of experience to this role. Bill is the Managing Editor of the Bank of America Study of Philanthropy and the author of numerous white papers on investment policy and endowment governance. He is well known as a speaker and moderator at events convened by leading industry associations and by Bank of America, and also advises the Bank's nonprofit clients.

Prior to joining Bank of America in 2017, Bill served as the Executive Director of the Commonfund Institute, where he edited many of the leading studies on endowment investment and governance, including those for the National Association of College and University Business Officers (NACUBO), the Council on Foundations and the National Business Officers Association.

In 2021 Bill was honored with NACUBO's Rodney H. Adams Endowment Management Award for outstanding individual contributions to professional development activities in the area of college and university endowment and investment management.

Bill holds a B.A. in English Literature from Yale University, a J.D. from the Northwestern University School of Law, and an M.B.A. from the J.L. Kellogg Graduate School of Management.

Bill does not provide legal advice in his role at Bank of America.

Institutional Investments & Philanthropic Solutions (also referred to as "Philanthropic Solutions" or "II&PS") is part of Bank of America Private Bank, a division of Bank of America, N.A., Member FDIC and a wholly owned subsidiary of Bank of America Corporation ("BofA Corp."). Trust, fiduciary and investment management services are provided by wholly owned banking affiliates of BofA Corp., including Bank of America, N.A., and its agents. Brokerage services may be performed by wholly owned brokerage affiliates of BofA Corp., including Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill").

MLPF&S makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of BofA Corp. MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Certain Bank of America Private Bank associates are registered representatives with MLPF&S and may assist you with investment products and services provided through MLPF&S and other nonbank investment affiliates.

Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
-----------------------------	--------------------------------	-----------------------

Bank of America and the Bank of America logo are registered trademarks of Bank of America Corporation.

© 2023 Bank of America Corporation. All rights reserved. | MAP6068846 | PB-204-KIT | 04/2024

 To learn about Bank of America's environmental goals and initiatives, go to bankofamerica.com/environment. Leaf icon is a registered trademark of Bank of America Corporation.