

An aerial photograph of the Charlotte, North Carolina skyline. The image shows a dense cluster of skyscrapers and commercial buildings. In the foreground, a prominent white skyscraper with a unique, angular top is visible. To its right is a tall, dark glass skyscraper. In the background, a large, white, circular stadium is visible. The city is surrounded by greenery and parking lots. The sky is clear and blue.

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2010 BUSINESS OUTLOOK

A message from Mayor Anthony Foxx

IN PARTNERSHIP WITH THE CHARLOTTE CHAMBER, I am pleased to present the

BusinessFirst Charlotte 2010 Business Outlook. The opinions in this report are from 150 business leaders from a wide variety of industries across our community. Their cautious optimism about job growth and profitability are hopeful indicators that Charlotte will begin to see recovery from the national recession this calendar year.



Mayor Anthony Foxx

Significant questions we have yet to answer, include:

- » How quickly will the credit markets return to health and expand support to businesses?
- » How does the dramatic realignment of the financial services industry affect Charlotte businesses?
- » When will we see a return to sustained job growth?
- » What sectors will emerge as dominant players in the next decade?

I believe there are opportunities for economic growth in Charlotte that will outpace the national economy. Wells Fargo's acquisition of Wachovia resulted in fewer job losses than we expected, and Bank of America has reaffirmed its commitment to remain headquartered in Charlotte. Companies focused on energy production and research have found Charlotte to be the right place to be, positioning us for growth in both the traditional and alternative energy sectors. Recent expansions and relocations to Charlotte are helping to further diversify our local economy.

As your Mayor, I am working hard to bring jobs to Charlotte. In February, I will host a Jobs Summit in our City, followed by a Business Capital and Financing Summit in June. I have also commissioned a plan to help small businesses, where we see the greatest potential for job growth.

In Charlotte, we are working hard to lay a foundation for the next wave of growth, and it starts with *BusinessFirst* Charlotte's mission to understand and respond to the needs of our existing businesses.

A handwritten signature in black ink, appearing to read 'Anthony Foxx'.

Mayor Anthony Foxx

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a City-Chamber Program

A partnership of the
City of Charlotte and the
Charlotte Chamber



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www.PatrickSchneiderPhoto.com

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A message from Bob Morgan, Chamber President

IN PARTNERSHIP WITH THE CITY OF CHARLOTTE,

I am delighted to present the *BusinessFirst* Charlotte 2010 Business Outlook. It is now more important than ever to learn from the lessons 2009 brought all of us and to move forward in 2010 with a fresh look on evolving our businesses and our economy. One way the Charlotte Chamber is shaping our program of work is by listening to existing industries in Charlotte-Mecklenburg through our business retention and advocacy initiative, *BusinessFirst* Charlotte. Through this program we want to better understand the many challenges companies face in this time and this economy so we can best serve our members.



Bob Morgan

The past two years have brought many uncertainties and the year ahead undoubtedly won't be easy, but the Chamber is working to help companies in Charlotte recover as quickly as possible. We continue to place economic development as a major priority in our Chamber. This year our focus is on putting ourselves in our members' shoes. This means asking ourselves a few questions to better understand where we are today and where we would like to be in the immediate future.

- » Which industries should we look to target to support and sustain existing businesses?
- » Which new and existing industries can best stimulate job creation and growth?
- » Through *BusinessFirst* Charlotte we will continue to do all we can to help existing companies thrive in our City.

We look to our Public Policy Department to help make doing business in Charlotte easier. Our Economic Development agenda directly coincides with our legislative agenda. We have and will continue to address the issues of the regulatory process to make Charlotte an even more friendly business community. We need to hear from you, our members and our existing companies to better understand your frustrations with bureaucracy and issues surrounding doing business in Charlotte. We will be persistent in working with our government to improve transportation, taxation and education; knowing those are key factors in keeping businesses and attracting new investment.

Looking ahead in 2010, our number one priority will be focusing on the needs of our members.

A handwritten signature in black ink that reads "Bob Morgan". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Bob Morgan,
President, Charlotte Chamber

Executive Summary

IN THE LAST QUARTER OF 2009, *BusinessFirst* Charlotte surveyed 150 local decision-makers from some of Charlotte's leading businesses to understand the relative strength of the local business climate and hear from local business about their prospects for growth over the next 12 months. Representative of a diverse set of industry sectors, these decision-makers may be the best predictors of recovery in the local economy. Respondents include large employers and fast-growing small businesses, and include both traditional and emerging industries.

Key findings from the 2010 Business Outlook Survey:

Jobs And Business Retention

Local economy stabilizes in 2010, produces modest job growth; businesses indicate commitment to Charlotte

- » Businesses leaders surveyed by *BusinessFirst* Charlotte expect 3.9 percent growth in employment.
- » 15 percent of respondents expect to expand operations locally in 2010.
- » 93 percent of respondents expect no change in local leadership in 2010 — indicating stability for most Charlotte companies.
- » 69 percent of sales occur in the local or regional marketplace, lessening the likelihood of significant relocations from the Charlotte region.

Profitability And Growth

Local companies are cautious, but optimistic about their chances for profitability.

- » Sales and revenue growth in excess of 10 percent is expected by half of respondents; and only 16 percent expect their sales and revenue to decline.
- » A majority of firms believe they will do better than their industry average in 2010, but one third of respondents expect to see no industry growth in 2010.
- » One out of five companies signal weakness in sales and revenue totals.



Charlotte's Business Climate

Business climate rating falls due to the effect of the recession

- » 56 percent of businesses feel positively about the Charlotte business climate; down from 82 percent in 2008; 14 percent feel negatively; up from 3 percent in 2008
- » The cost of doing business in Charlotte was a new measure in 2009. Overall, 42 percent were satisfied with Charlotte's relative cost of doing business. One quarter of business leaders surveyed expressed concern.

About the Survey

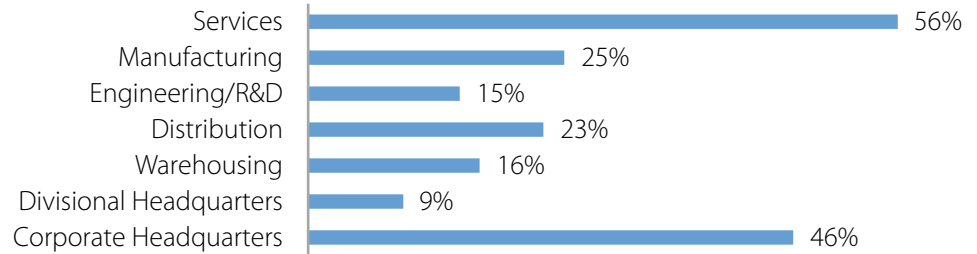
The information presented in this report is compiled from surveys of 150 decision-makers in local businesses completed between October and December 2009. Over half of the respondents have their corporate or divisional headquarters in Charlotte, and 24 percent of respondents have over 100 employees at their Charlotte location. Together, these businesses represent approximately

30,000 jobs (or eight percent of all jobs in Mecklenburg County).

While *BusinessFirst* Charlotte has interviewed 210 businesses in 2009, this report focuses only on the 150 companies responding to our 4th Quarter survey, providing the most accurate and relevant look at the year ahead.



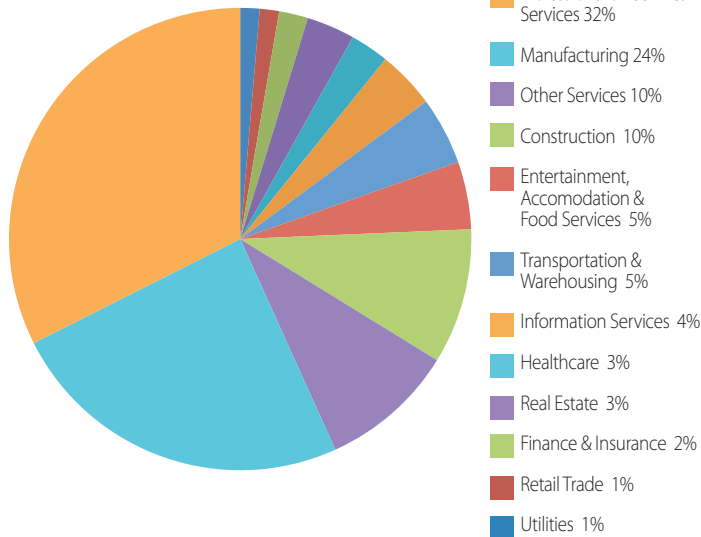
Primary Functions of Local Facility?



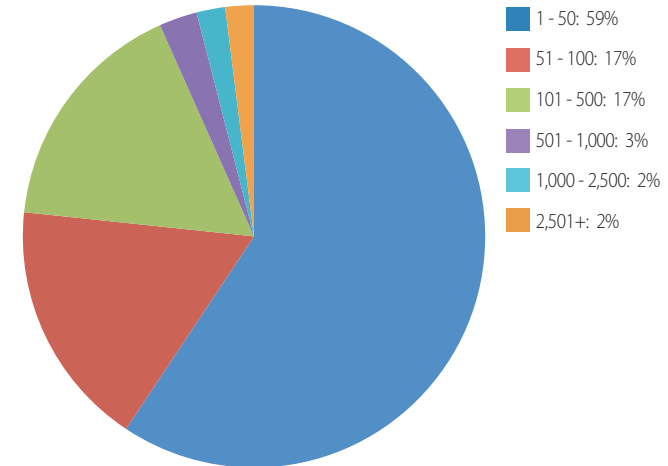
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Industry Representation



Number of Employees



Jobs And Business Retention

Local economy stabilizes in 2010, produces modest job growth

- » Responding companies expect to add 1,247 jobs over the next 12 months (or 3.9 percent growth).
- » Job growth: Year-end 2009 (Actual): 30,004
Year-end 2010 (Projected): 31,251.
- » In addition, there were several significant relocation and expansion announcements in the last quarter of 2009 from companies not included in our survey, further pointing to modest job growth in our community in 2010. These including Zenta (1,000 new jobs), Neighborhood Assistance Corporation of America (1,000 new jobs) and Electrolux North American Headquarters (750 new jobs).

“We have seen an increase in hiring activity across all employee levels and all sectors in the past few months. Temporary and contract placement increased in Q4 of 2009 — even more encouraging is that we are seeing significant increases in demand for senior-level professionals as employers strategically prepare for a rebound.”

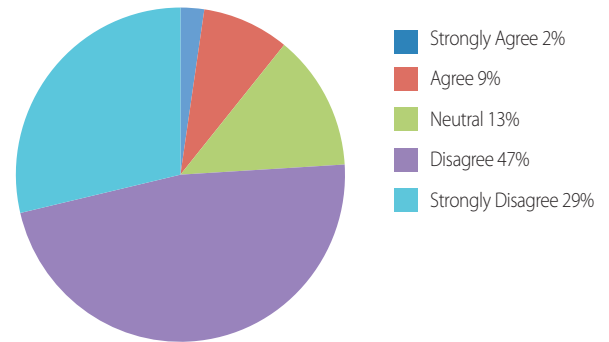
— Robert Fish, President, Bankston Partners, local staffing agency

Businesses are committed to Charlotte

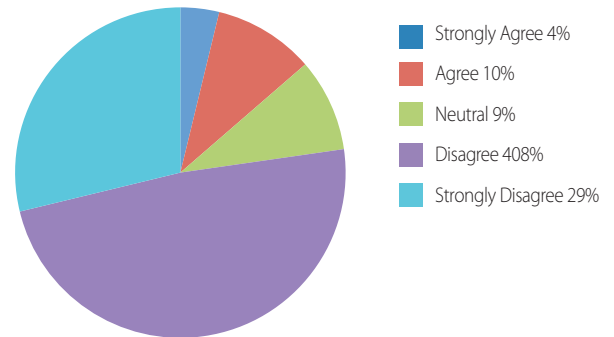
- » 69 percent of sales occur in the local or regional marketplace, lessening the likelihood of significant relocations from the Charlotte region.
- » 93 percent of respondents expect no change in local leadership in 2010 — indicating stability for most Charlotte companies.
- » 15 percent of respondents indicated they will be expanding their local facility in 2010.

Relocation of job functions

We will look to relocate some job functions **to** Mecklenburg County from other locations over the next 12 months.

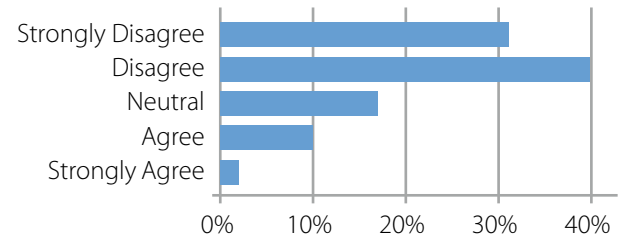


We will look to relocate some job functions **out of** Mecklenburg County from other locations over the next 12 months.



Recruitment

We anticipate being recruited by other cities/municipalities over the next 12 months to move job functions out of Mecklenburg County.



Profitability And Growth

Sales expected to rebound in 2010; business owners cautious, but optimistic

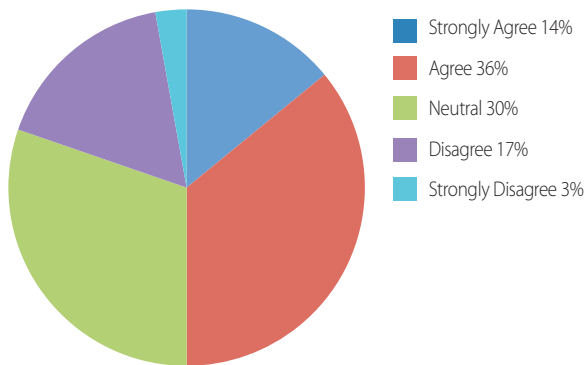
- » 50 percent say they ended 2009 with relatively stable and strong sales and revenue totals, however 20 percent may be at risk in a more prolonged recession.
- » 67 percent of respondents expect an increase in sales (with 50 percent expecting sales to climb by 10 percent or more).
- » Only 16 percent of companies expect that sales revenue to continue to slide over the next 12 months.

Charlotte businesses are well-positioned within their industries

- » 55 percent of respondents feel their company's growth will outpace their industry's growth in 2010.
- » 38 percent of respondents believe their industry will not see strong growth in 2010.
- » One in five local companies believes they will mirror or lag behind their industry's growth trend.

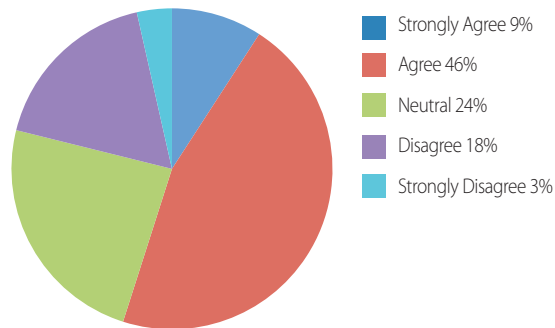
Profitability

Our company's sales/revenue totals are very strong

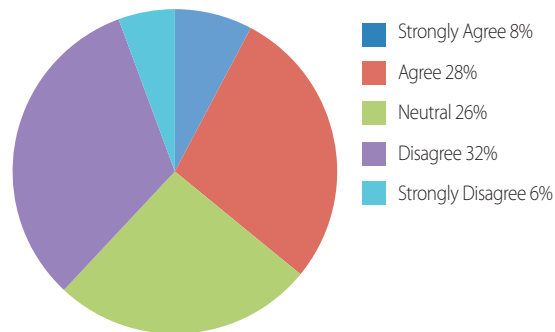


Growth

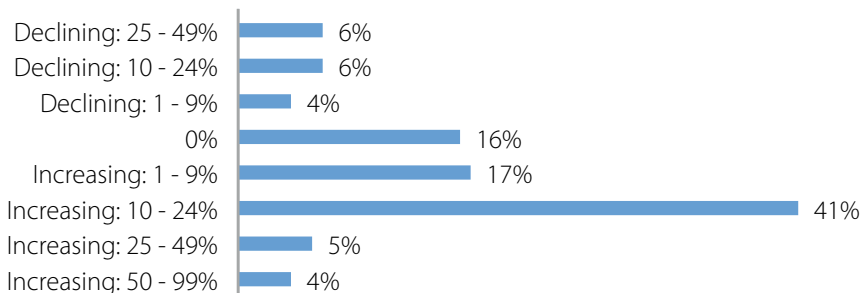
I expect our company's growth to outpace the industry's growth over the next 12 months



I expect strong growth in my industry over the next 12 months



What is your projected percentage change in sales over the next year?



Charlotte's Business Climate

Overall rating of Charlotte's business climate falls, reflecting affect of the recession

The overall perception of the local business climate faltered in 2009, underscoring the fact that Charlotte was not immune to the effects of the national recession. Local businesses rated the labor force and workforce development system as top business climate assets, along with a general sense of community safety.

Predictably, access to capital and the overall cost of doing business are top concerns in 2010. Building development regulations and processes along with the condition of local roads and highways also cause some concern for local companies, as they have in past surveys.

"Charlotte is one of the top areas in the country to live and work. The area has a strong, educated workforce and excellent access to transportation."

— Mike Jones, President, Husqvarna North American Headquarters

"We are seeing more businesses willing to invest and expand operations. With that said, accessing capital, particularly working capital and lines of credit, remains a challenge since it is more difficult to demonstrate the ability to service new debt.

— Richard Bargoil, Executive Director, Business Expansion Funding Corporation (BEFCOR)

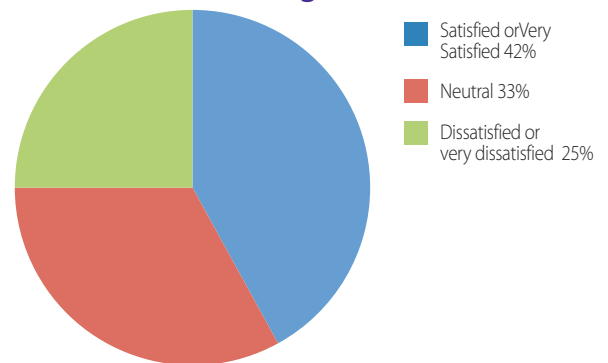
Business Climate Assets

- » Quality of Colleges and Universities
- » Availability of Qualified Personnel
- » Community Safety
- » Quality of Workforce Training Programs

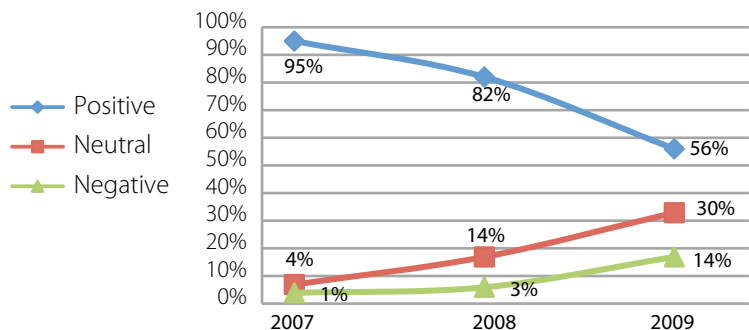
Business Climate Challenges

- » Availability of Capital/Financing
- » Overall Cost of Doing Business
- » Building Development Regulations/Processes
- » Local Roads and Highways

Overall cost of doing business



Overall business climate ranking



New Measure For 2009: Overall Cost Of Doing Business

The overall cost of doing business is a new measure in our 2010 report, and relates to how satisfied local businesses are with the varied business costs in our community, including labor costs, utility rates, taxes, fees and cost of living indices.

In 2009, the Kosmont-Rose Institute classified Charlotte as one of the 50 most affordable cities in America in its biennial Cost of Doing Business Survey. The survey compared over 421 cities and counties across the nation in overall cost of doing business.

Thank You

We would like to thank the 166 companies that participated in the *BusinessFirst* 2010 Business Outlook.

A&K Painting Co. Inc.
ACN Inc.
Acoustical Interiors Inc.
Aerotek
AG Zoutewelle PA
Albert's Organics
Allegra Print & Imaging
All-State Industries
AM King Construction Co. LLC
American Charters, Ltd.
AmtDirect
Anderson Legal Counsel
Anonymous Survey Respondent
APEX Performance, Inc.
AppleTechBiz, Inc.
AREVA NP
Arthurs Gutters and Painting
B. Robert's Foods, LLC
Back To Basic Tutoring
BASF Corporation
Belk Printing Technologies
Bergman Brothers Staffing Inc.
Birdsong Gregory
Blue Bell Creameries
Blythe Development Co.
BMC West Building Materials
Bovis Lend Lease, Inc.
Branch Banking & Trust Co.
Branstorm Public Relations & Marketing
Bull Engineered Products
Career Search Strategies
Carolina Associated Restaurants, Inc.
Carolina Legal Staffing
Carolina Tractor & Equipment Co. Inc.
Carowinds
Carriage Club of Charlotte
Ceramco
CERTEX
Charlotte Bolt & Foundation Systems
Charlotte Metro Credit Union
Choate Construction Co.
Cinda Corporation
Cisco Systems

Clariant Corp. (HQ)
Clark & Chase Research Inc.
Climate Systems
CoaLogix — SCR Tech
Coca-Cola Bottling Co. Consolidated
Cogdell Spencer Inc.
Cognis Corporation
Coleman Law & Associates Inc.
Compass Group (HQ)
Conder Flag Company, Inc.
Control Design Supply
Convergus Corporation
Creative Enhancement, LLC
Crowder Construction
CRS Building Automation
CSABA Spottle & Partners
Cummings Construction Corp.
Cumulus Fibers
Dascher Transport of America
Dellner Couplers
Delta Mold, Inc.
DEW Electric, LLC
Distribution Technology Inc.
Duke Energy Corp
E. C. Griffith Company
Eaton Corporation
Elements Diet & Fitness
Elm Engineering Inc.
Falcon Metal
Fleet PM
Flying Bridge Technologies, Inc.
Food Lion
Forbo Movement Systems
Funny Bone Improv
Garmon & Company, Inc.
General Steel Drum Corp.
Genpak Corporation
Gerdau Ameristeel Corp.
Global Recycling Incorporated
Goodrich Corp. (HQ)
Goodwill Industries of the Southern Piedmont
Gorell Enterprises, Inc.
Gottayoga
Greater Charlotte Apartment Association

Griffen Home Health Care, Inc.
HESS Corporation
HNTB Corporation
Holiday Inn Center City
Home Builders Association of Charlotte Inc.
Horizon Lines
HR XCEL Inc.
HRG North America
Husqvarna
Intercon Building Corporation
International Freight Solutions
International Paper — The Sterling Group Worldwide
Internetwork Engineering
Jefferson Wells International Inc.
Jenkins-Peer Architects PA
Kem-Wove, Inc.
Knowmad Technologies
KPMG LLP
Lee Morgan Inc.
Livingstone Coating Corp.
Lockhart Hornby
M.O.T. & Associates
M.R. Snyder Company
MAC Papers, Inc.
Macie Caldwell Consulting Services
Mallard Creek Polymers, Inc.
Manual Therapy Associates, LLC
Mercer LLC
Metrolina Steel, Inc.
Metromont Natural Recycling Center
Midrex Technologies Inc.
NASCAR Images, LLC
National Association of the Remodeling Industry
National Welders Supply Co., Inc. (HQ)
Newton Machine Co Inc.
Norandex Building Materials Distribution
North Highland Co.
Oerlikon Textiles
OmniSource
Otis Elevator

Pavco
Pavestone Company
Phoenix Metals
Plantation Estates
Princess Cleaners
Rajbhog Foods
RBC Bank
RHA Howell, Inc.
Rohm & Haas Inc.
S & ME, Inc.
Sadies Soulful Southern Experience
Saia Motor Freight Line Inc.
Salon Se Swa
Shred It
Siemens — Westinghouse Power Corp., Turbine & Generator Plant
SimplexGrinnell, Inc.
Small Business Technology Development Center
Sonoco Recycling
Southeast Industrial Equipment
SouthEnd Home Improvement
Southern Elevator
Southwood Corp.
Spherion
State Farm — Wil E. Brooks Agency
Stewart Engineering Inc.
Strategic Computer Solutions
TargetCare
TEK Systems
Terracon, Inc.
The Charlotte Music Company
Tribble Creative Group
TriMech Solutions
Tropical Nut & Fruit
Two Men & A Truck
Victory Lane Indoor Karting
Vulcan Materials Co.
WebsiteBiz Inc.
Westinghouse Electric Company
Wingate Advisory Group, LLC

Thank You

We would also like to thank the 210 companies that participated in the *BusinessFirst* Charlotte interviews.

1-800-Flowers
A.O. Smith-Water Systems Div.
Academic Plus
ai Design Group, Inc.
Alliance Credit Counseling
Allison-Erwin Company
aloft Charlotte Uptown @ the
EpiCentre
Alpha, an independent division of
Checkpoint Systems
Andrew Roby, Inc.
APM Terminals North America, Inc.
Ardent Logistics
Argand Energy Solutions
B. Robert's Foods, LLC
Back To Basics Tutoring
Balasco Benefit Design
Bank of America — Business Banking
Basil Thai Cuisine
Beacon Partners
Bear Rock Cafe
Belk
BioSelect, Inc.
Bloom
Boatsman Gillmore & Associates
Bridge Terminal Transport Inc.
Britax Child Safety, Inc.
Buca Di Beppo
Burchette & Associates, Inc.
Can-Am Custom Trucks, Inc.
Carolina Public Relations/
Marketing, Inc.
Carolina Tractor & Equipment Co. Inc.
Carolina Turn-Key Services LLC
Ceres Transportation Group Inc.
CH2M Hill
Charlotte Day Care
Charlotte New Home Guide
Charlotte Pipe & Foundry Co.
Chris-B-Clean
Cintas Corp.
Cliff & Son Upholstery
Coface North America, Inc.
Cognis Corporation
Commercial Works
Comporium Communications
Consolidated Planning, Inc.
Cook & Boardman Inc.
Corlin Productions
Costco Marketing
Cunningham & Co. Mortgage Bankers
Curtis Screw Co., LLC, Premier Precision
Plant
Custom Paint & Body Inc.
Cybertary
Daedalus Properties

data-doc, inc.
Dilworth Billiards
DW Roofing Inc.
ELDENN Corp./Boudreaux's Iron Shop
Electric City Printing
Emulsion Arts
Environmental Design Landscape, Inc.
FABO
Falcon Metal Corporation
Findley Davies, Inc.
First Commercial Real Estate
Advisors, LLC
Flextronics
Flet PM Onsite Services
FreemanWhite Inc.
Frito-Lay, Inc.
FXI - Foamex Innovations
GAI Consultants
Genesis 10
Global Medical Imaging LLC
Globe Express Services
Green Lands
Green Turnkey
Hall Contracting Corp.
Harris-Crane Inc.
HDR Engineering Inc.
Hendrick Construction Inc.
Hilton Charlotte Center City
Hinrichs Flanagan Financial
Home Health Enterprises, Inc.
Horne Heating and Air Conditioning
Huber Technology, Inc.
IBM Corp.
Impact Initiatives
InterDyn-Artis
International Auto Care, Inc.
IT Consulting
James River Equipment, Inc.
Johnson C. Smith University
Jones Lang LaSalle
Jubilee Diversified Services
Just Coffee, Inc. / Dilworth Coffee
Kreative Group, Inc.
L. A. Management Company, LLC
Landmark Security Inc.
Lenny's Sub Shop
Life's Decision Planning
Lion Paw Entertainment
Lion Tribe
LocalJobs.com
Loving Touch Adult Day Care
Lyerly Agency Inc.
Lyf-Tym Building Products
Maersk Inc.
Maid In Mecklenburg
Matthews Moving Systems Inc.

Mattress Stea-MITE-izers of Charlotte
Mauser Corp.
Max Daetwyler Corp
McAllister Obsessive Constructive
Measurements, Inc.
Metro Networks
Mitchell & Culp, PLLC
Moer Foundation, Inc.
Morehead Associates
Moving Ideas, Inc.
NC Music Factory
NC2 Properties
NDR Energy Group
Nevaeh Solutions
Niche Market
Norwood Career Advisors
Nursefinders of Charlotte
Occasions Catering & Event Planning
Occupational Safety and
Environmental Associates, Inc.
Odyssey Logistics & Technology Corp.
Old North State Masonry, LLC
On A String Bead Shope
Paradox Films, Inc.
Paralegal Outsourcing Associates, Inc.
Party Reflections, Inc.
PC Godfrey Inc.
Penske Truck Leasing
Pfeiffer University
Phase 3 Media
Picture Perfect Gallery
Piedmont Natural Gas
Pine Island Country Club
Pinto Metal Fabrication, Inc.
Powerful Edge Coaching
Preferred Parking Service Inc.
PricewaterhouseCoopers LLP
Professional Communications
Providence Produce Market
Pulcra Chemicals LLC
Pure Body Salon & Spa, Inc.
Pure Genius Childcare
RDS Electrical Contracting of
Charlotte, LLC
Reid, Jones, McRorie & Williams, Inc.
Revenue Rescue Resources
Rite Aid Distribution Center
RoundPoint Financial Group
RP Design Web Services
S & L Consultants/Academic Achievers
S.C. Hondros and Associates, Inc.
Salem Enterprises Inc.
SAM (Store and Move)
Sato America, Inc.
Schaefer Systems International, Inc.
Servpro

Shane's Rib Shack
Sharon Fashions
Sherpa, LLC
Shultz Engineering Group
Shutterbooth
Silent Partners Group, Inc.
Simon's Mart
Smith Collins, PLLC
SouthEastern Petroleum Systems
Southeastern School of
Neuromuscular Massage
Stage Coach Home Staging
Starr Electric Co., Inc.
Stefano Foods
Strategic Power Systems
Summerfield Auto Service
Sustainable Development
Services, Inc.
Synergy Network Concepts
Tank Town Truck Repair
Ted A. Greve & Associates
TG&L Properties
The Anstad Group
The At Home Guide
The Charlotte Post Publishing
Company
The Food Shack
The Lee Institute/Duke Mansion
The Linda Construction Company
Thompson Financial Group
Toll Brothers, Inc.
Tolt Service Group LLC
Total Event Production
Trainer Glass Co.
Treasure Coast Capital Partners
Treffert Coatings US, Inc.
Truliant Federal Credit Union — Tyvola
Tuscan Development
U. S. National Whitewater Center
Uptown Imports
VACO LLC
Verdant Life LLC
W B Moore Company of Charlotte, Inc.
W. H. Gill & Associates Inc.
Wake Forest University — Charlotte
MBA Programs
West Side C Store
Whitehead Associates Inc.
Wild Wing Cafe
WPC Inc.
Wurth Wood Group
YMCA of Greater Charlotte
Your Steps to College, Inc.
Yu Consulting Engineers, PC

What is *BusinessFirst* Charlotte?

BusinessFirst Charlotte is a partnership between the City of Charlotte and the Charlotte Chamber to help local businesses grow. Through problem solving and advocacy, *BusinessFirst* Charlotte serves local businesses by going straight to the source — the local business owner or decision-maker. We believe in building long-term relationships with local business leaders so we can better understand the opportunities and challenges of growing businesses in Charlotte. Business growth preserves and stabilizes our local tax base, allowing the City and County to provide necessary public services. Local businesses also invest in citizens of the Charlotte region and their families, as well as a host of charitable, cultural and civic causes that make Charlotte a great place to live.

Each day *BusinessFirst* Charlotte volunteers and staff canvas our community meeting face to face with owners and key decision-makers in a wide array of business and industry. Since 2006, *BusinessFirst* Charlotte has visited more than 1,100 businesses in Mecklenburg County. Nearly one quarter of these businesses received specialized services from one or more of our program partners.

Our Partners Include:

Central Piedmont Community College
Charlotte Area Transportation System
Charlotte Center City Partners
Charlotte Dept. of Transportation
Charlotte Mecklenburg Utilities
Charlotte Mecklenburg Workforce Development Board
Charlotte Research Institute at UNC-Charlotte
Duke Energy
The Employers Association
JobLink Career Centers
Mecklenburg County
North Carolina Dept. of Commerce
North Carolina Dept. of Transportation
North Carolina Employment Security Commission
North Carolina State Industrial Extension Service
Piedmont Natural Gas Company
Service Corps of Retired Executives
US Small Business Administration



A photograph of a residential neighborhood with a prominent skyscraper in the background. The scene is set in Charlotte, North Carolina, featuring a mix of modern and traditional architecture. In the foreground, there are several large, well-maintained evergreen trees. To the left, a multi-story residential building with a mix of brick and light-colored siding is visible. In the center, a modern, multi-story building with a glass facade and a balcony is partially obscured by the trees. On the right, a portion of a traditional-style house with a gabled roof and a chimney is visible. In the background, the iconic Bank of America Corporate Center skyscraper rises prominently against a clear blue sky. The overall atmosphere is bright and clear, suggesting a sunny day.

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