

Transfer Request Form

Dartmouth College
Tax-sheltered account (TSA) 403(b)

For assistance please call 800.368.2745

A

Name of Financial Institution _____ Date _____

Address of Financial Institution _____ Financial Institution Phone Number _____

City/State/Zip _____ TSA Plan/Contract Number _____

Dear Sir/Madam: A new TSA plan has been established in my name with Calvert. I direct you to terminate the above-referenced TSA plan and either (*choose one*):

Liquidate all of the assets Liquidate a portion of the assets: \$ _____ or _____ %.

Approximate dollar amount to be transferred to Calvert \$ _____

B **Calvert, please invest my funds as follows: (Be sure that percentages add up to 100%.)**
Your initial investment must total at least \$50 per fund. Subsequent investments may be made in any fund or portfolio in amounts of \$50 or more.

EQUITY FUNDS

- 971 Calvert Global Alternative Energy Fund _____ %
- 911 Calvert New Vision Small Cap Fund _____ %
- 960 Calvert Small Cap Value Fund _____ %
- 972 Calvert International Opportunities Fund _____ %
- 914 Calvert Capital Accumulation Fund _____ %
- 961 Calvert Mid Cap Value Fund _____ %
- 926 Calvert World Values International Equity Fund _____ %
- 934 Calvert Large Cap Growth Fund _____ %
- 933 Calvert Social Index Fund _____ %
- 919 CSIF Equity Portfolio _____ %
- 910 CSIF Enhanced Equity Portfolio _____ %

BALANCED AND ASSET ALLOCATION FUNDS

- 905 CSIF Balanced Portfolio _____ %
- 962 Calvert Conservative Allocation Fund _____ %
- 963 Calvert Moderate Allocation Fund _____ %
- 964 Calvert Aggressive Allocation Fund _____ %

FIXED-INCOME FUNDS

- 929 Calvert Long-Term Income Fund _____ %
- 908 Calvert Income Fund _____ %
- 916 CSIF Bond Portfolio _____ %
- 923 Calvert Short Duration Income Fund _____ %
- 970 Calvert Ultra-Short Income Fund _____ %

MONEY MARKET FUNDS

- 901 Calvert First Government Money Market Fund _____ %
- 904 CSIF Money Market Portfolio _____ %

Signature _____

TOTAL 100%

Name (*please print*) _____

Daytime Telephone _____

Existing Calvert TSA Number _____

C Dear Sir/Madam:
A TSA plan has been established with Calvert in the name of the above-referenced participant. Custodian, Calvert Retirement Plans, accepts the transfer as requested. Accordingly, please transfer cash, as directed above, payable as follows:

Calvert FBO (*participant name*) _____ TSA Account Number _____

403(b) Processing, Boston Financial, DCS Crown Colony, 66 Brooks Drive, Braintree, MA 02184

Please contact an account representative at 800.368.2745 if you require further information to complete the transfer.

Thank you for your prompt cooperation. Sincerely,

Calvert Authorized Signer _____

Important Information — USA Patriot Act: Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. This information will be verified to ensure the identity of all individuals opening a mutual fund account.

Calvert mutual funds are underwritten and distributed by Calvert Distributors, Inc., member FINRA, subsidiary of Calvert Group, Ltd., 4550 Montgomery Avenue, Suite 1000N, Bethesda, MD 20814.