



University Transfer Request Form

Tax-sheltered account (TSA) 403(b)(7)
For assistance please call 800.368.2745.

PART I: FINANCIAL INSTITUTION INFORMATION

NAME OF FINANCIAL INSTITUTION _____ DATE _____

ADDRESS OF FINANCIAL INSTITUTION _____ FINANCIAL INSTITUTION PHONE NUMBER _____

CITY/STATE/ZIP _____ TSA PLAN/CONTRACT NUMBER _____

Please transfer the assets indicated below from the above-referenced TSA plan to my TSA Plan with Calvert:

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

PART II: FUND SELECTION

Calvert, please invest my funds as follows: Fund minimum of \$1,000 per fund must be met if no on-going contributions will be made. If on-going contributions will be made, the minimum per fund must be at least \$25.

NAME OF FUND	FUND NUMBER	ALLOCATION
1.		\$ _____ OR _____ %
2.		\$ _____ OR _____ %
3.		\$ _____ OR _____ %
4.		\$ _____ OR _____ %
5.		\$ _____ OR _____ %
6.		\$ _____ OR _____ %

SIGNATURE _____ DAYTIME TELEPHONE _____

NAME (PLEASE PRINT) _____ SOCIAL SECURITY NUMBER _____

PART III

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) _____

403(b)(7) PROCESSING, P.O. BOX 8060, BOSTON, MA 02266-8060

If you require further information to complete the transfer please call us at 800.368.2745. 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. #AF20058-201011