



# Transfer Request Form

Tax-sheltered account (TSA) section 403(b)(7)  
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 \_\_\_\_\_

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  \_\_\_\_\_ %.

## B

**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.

Share Class **STOCK FUNDS**

- 910 CSIF Enhanced Equity Portfolio \$ \_\_\_\_\_
- 911 Calvert New Vision Small Cap Fund \$ \_\_\_\_\_
- 914 Calvert Capital Accumulation Fund \$ \_\_\_\_\_
- 919 CSIF Equity Portfolio \$ \_\_\_\_\_
- 926 Calvert World Values International Equity Portfolio \$ \_\_\_\_\_
- 934 Calvert Large Cap Growth Fund \$ \_\_\_\_\_
- 933 Calvert Social Index Fund \$ \_\_\_\_\_
- 960 Calvert Small Cap Value Fund \$ \_\_\_\_\_
- 961 Calvert Mid Cap Value Fund \$ \_\_\_\_\_

**BALANCED AND ASSET ALLOCATION FUNDS**

- 905 CSIF Balanced Portfolio \$ \_\_\_\_\_
- 962 Calvert Conservative Allocation Fund \$ \_\_\_\_\_
- 963 Calvert Moderate Allocation Fund \$ \_\_\_\_\_
- 964 Calvert Aggressive Allocation Fund \$ \_\_\_\_\_

Share Class **BOND FUNDS**

- 908 Calvert Income Fund \$ \_\_\_\_\_
- 916 CSIF Bond Portfolio \$ \_\_\_\_\_
- 923 Calvert Short Duration Income Fund \$ \_\_\_\_\_
- 929 Calvert Long-Term Income Fund \$ \_\_\_\_\_

**MONEY MARKET FUNDS**

- 901 Calvert First Government Money Market Fund \$ \_\_\_\_\_
- 904 CSIF Money Market Portfolio \$ \_\_\_\_\_

**TOTAL PER MONTH** \$ \_\_\_\_\_

Signature \_\_\_\_\_

Daytime Telephone \_\_\_\_\_

Name (please print) \_\_\_\_\_

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)(7) Processing, P.O. Box 219273, Kansas City, MO 64121-9273**

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 \_\_\_\_\_