



Investment Application

Columbia University — Plan I.D. #104

To be completed by employee. For assistance please call 800.368.2745.

PART I: ACCOUNT REGISTRATION (Please type or print clearly)

NAME	SSN	DATE OF BIRTH	HIRE DATE
ADDRESS			
CITY	STATE	ZIP	
EMAIL ADDRESS	DAYTIME PHONE		

(If mailing address is a post office box, a street address is also required by the USA Patriot Act).

PART II: FUND SELECTION

Please invest my contributions as follows: (please be sure that the percentages add up to 100%). All investments that fail to designate a Fund will automatically be invested in Calvert Moderate Allocation Fund (963). Before completing the Employer Contributions section, please check with your Benefits Office to determine if you will be receiving Columbia University contributions.

EMPLOYEE VOLUNTARY CONTRIBUTIONS

MONEY MARKET FUNDS

904 Calvert Money Market Portfolio _____ %

FIXED-INCOME FUNDS

- 908 Calvert Income Fund _____ %
- 980 Calvert High Yield Bond Fund _____ %
- 929 Calvert Long-Term Income Fund _____ %
- 916 Calvert Bond Portfolio _____ %
- 923 Calvert Short Duration Income Fund _____ %
- 970 Calvert Ultra-Short Income Fund _____ %
- 974 Calvert Government Fund _____ %

BALANCED AND ASSET ALLOCATION FUNDS

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

EQUITY FUNDS

- 919 Calvert Equity Portfolio _____ %
- 979 Calvert Large Cap Value Fund _____ %
- 910 Calvert Enhanced Equity Portfolio _____ %
- 933 Calvert Social Index Fund _____ %
- 914 Calvert Capital Accumulation Fund _____ %
- 960 Calvert Small Cap Fund _____ %
- 971 Calvert Global Alternative Energy Fund _____ %
- 926 Calvert International Equity Fund _____ %
- 973 Calvert Global Water Fund _____ %
- 972 Calvert International Opportunities Fund _____ %
- 982 Calvert Equity Income Fund _____ %

Total

EMPLOYER CONTRIBUTIONS

MONEY MARKET FUNDS

904 Calvert Money Market Portfolio _____ %

FIXED-INCOME FUNDS

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Total

PART III: MARITAL STATUS (Select one option)

I am legally married I am single

PART IV: BENEFICIARY DESIGNATION

Primary Beneficiary/Beneficiaries: Subject to the conditions below, I hereby designate the following as my beneficiary(ies) under the Calvert Section 403(b)(7) Custodial Agreement.:

Share Percentage: _____% Relationship to Owner: Spouse Nonspouse

NAME _____ SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

RESIDENCE ADDRESS _____

Share Percentage: _____% Relationship to Owner: Spouse Nonspouse

NAME _____ SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

RESIDENCE ADDRESS _____

Contingent Beneficiary/Beneficiaries: Should the above-named predecease me, I hereby designate the following as my contingent beneficiary(ies):

Share Percentage: _____% Relationship to Owner: Spouse Nonspouse

NAME _____ SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

RESIDENCE ADDRESS _____

Share Percentage: _____% Relationship to Owner: Spouse Nonspouse

NAME _____ SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

RESIDENCE ADDRESS _____

Unless I have otherwise indicated, each payment made according to this Designation shall be paid in equal shares to the Primary Beneficiary(ies) who survive(s) me. If no Primary Beneficiary survives me, then payment shall be made in equal shares to the Contingent Beneficiary(ies) who survive(s) me. **Restriction: This Designation shall be effective only if received by the Custodian prior to the death of the Participant.** This Designation revokes all prior designations of beneficiary made by me with respect to my interest in this Custodial Account. I reserve the right to change my beneficiary(ies) by filing another Designation with the Custodian.

PART V: SIGNATURE (Please sign below)

I acknowledge receipt of a copy of a current Prospectus of the above designated Fund(s) and agree to be bound by the terms of such Prospectus(es). I certify, under penalty of perjury, that my Social Security number shown on this application is correct and I designate the beneficiary (ies) as listed above. I also acknowledge that I have received and read and agree to the terms of the Custodial Agreement for the Calvert Section 403(b)(7) Custodial Account. The Calvert Prospectus and Custodial Agreement can be found at www.calvert.com/investor-workplace-columbia.html.

SIGNATURE OF EMPLOYEE _____ DATE _____ WITNESS (OTHER THAN BENEFICIARY) _____ DATE _____

By submitting this form you have agreed to an electronic signature. If mailing:

CUSTODIAN, CALVERT RETIREMENT PLANS, P.O. BOX 8060, BOSTON, MA 02266-8060

Protecting Your Privacy

Your relationship with us is important. Please take time to review this statement about our privacy policies with existing and customers. We do not disclose any non-public personal information about our customers to anyone, except as permitted by law.

Your privacy is a top priority. You have shared personal and financial information with us:

- Information we receive from you on applications or other forms, such as your name, address, social security number, assets and income; and
- Information about your transactions with us, our affiliates or others, such as your account balance, payment history and parties to transactions;

We use this information to provide our products and services to you, and to assist you in achieving your financial goals. We promise to protect the security, privacy and use of your personal and financial information, including account and transaction details.

Your information is shared only in limited ways and for specific purposes.

We do not currently share your information with affiliates in the Calvert and the UNIFI Companies; however, we reserve the right to do so. Also, we may disclose information we collect to companies that perform administrative or marketing services on our behalf, such as transfer agents, or printers and mailers that assist us in the distribution of materials, or others as permitted by law, in order to:

- provide you with faster, more comprehensive service, and
- implement security measures and fight fraud for your continued protection.

Calvert does not give or sell information about you or your accounts to any other company, individual or group. However, governmental agencies, regulatory authorities and other entities may have access to such information if permitted by law.

The products and services you use are delivered in a secure environment.

Whether you use automated telephone capabilities or the Internet, you can feel confident that we employ security measures that are appropriate to each technology. For more information on Internet-specific privacy and security measures, please visit our Web site at www.calvert.com.

Keeping your personal information accurate and current is a vital concern.

We strive to keep your personal and financial information accurate. If you believe that our records are incorrect or out of date, please notify us by contacting Investor Relations at 800.368.2745 and we will make any necessary corrections.

Employee access to your information is limited.

Our employees have limited access to shareholder information based on their job function. This enables them to assist you in completing transactions, obtaining additional information about our products and resolving any problems that might arise. All employees are instructed to use the strict standards of care outlined in Calvert's confidentiality rules. Employees who do not conform to Calvert's confidentiality rules are subject to disciplinary actions that may include dismissal.

Your privacy preferences will be respected.

Since your financial needs change and our financial products are continually developing, we may contact you to determine if we can be of additional service to you. Most of our shareholders appreciate hearing about our new offerings and choose to continue to do so. If you have additional questions about these policies, please call Investor Relations at **800.368.2745**.

This notice is subject to change.

Overnight Mail

Calvert
c/o BFDS
330 West 9th Street
Kansas City, MO 64105

Regular Mail

Calvert
PO Box 219544
Kansas City, MO 64121-9544

Telephone Numbers

Shareholders 800.368.2745
Financial Professionals 800.368.2746
TTD for hearing impaired 800.541.1524

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.

Business Continuity — Calvert has a Business Continuity Plan in place to address the possibility of a significant business disruption and how it will respond to events of varying scope. For more information, please call 800.368.2746 or for a summary go to www.calvert.com.

Calvert mutual funds are underwritten and distributed by Calvert Investment Distributors, Inc., member FINRA and subsidiary of Calvert Investments, Inc. www.calvert.com. #AF20029-201109