

Letter of Instruction For Mutual Funds and Securities

The Letter of Instruction is required if you are transferring securities or mutual funds. This Letter of Instruction is not required if you are transferring cash or stock certificates.

Please complete the letter and submit as follows:

For Mutual Funds	For Securities
<p>Send to Calvert Giving Fund</p> <ul style="list-style-type: none"> ▪ Original Letter of Instruction ▪ Required Medallion Signature Guarantee (This can be obtained at most financial firms) ▪ Copy of a recent statement from the transferring mutual fund company ▪ Donor Application or Additional Contribution Form 	<p>Send to Calvert Giving Fund</p> <ul style="list-style-type: none"> ▪ Copy of the Letter of Instruction ▪ Required Medallion Signature Guarantee (This can be obtained at most financial firms) ▪ Donor Application or Additional Contribution Form <p style="text-align: center;"><i>and</i></p> <p>Send to the firm currently holding the securities:</p> <ul style="list-style-type: none"> ▪ Original Letter of Instruction

Mail to:
Calvert Social Investment Foundation
7315 Wisconsin Avenue, Suite 1100W
Bethesda, MD 20814

Telephone: 800.248.0337
Fax: 301.280.1399

Questions? Call 800.248.0337

Or visit www.calvertgiving.org

1. ACCOUNT INFORMATION

For Mutual Funds:

Name of Mutual Fund Company

Fund Mailing Address

City State Zip

Daytime Telephone

For Securities:

Name of Broker and/or Firm Holding Assets

Firm Mailing Address

City State Zip

Daytime Telephone

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm to the Calvert Foundation Giving Fund.

From: _____

Account Number

_____ Account Name(s)

1. _____ shares of _____
Number Name of Security or Mutual Fund

2. _____ shares of _____
Number Name of Security or Mutual Fund

3. _____ shares of _____
Number Name of Security or Mutual Fund

Please deliver all eligible securities to:

DTC#: 0164, Code 40
Custodian: Charles Schwab & Co., Inc
Beneficiary Account Name: Calvert Social Investment Foundation
Beneficiary Account Number: 6059-1162

Shares should be transferred in kind and are not to be liquidated.

Physical share certificates may require a **Third Party Release Form** (please call 800.248.0337 for additional information). Any physical deliveries (i.e., certificates) should be sent to Calvert Foundation, 7315 Wisconsin Ave. Suite 1100W, Bethesda, MD 20814, for credit to the account number(s) above. **All deliveries should include client and Giving Fund name.** All registered owners must endorse the certificate by writing "Calvert Social Investment Foundation" between the words "appoint" and "attorney" in the space provided on the back of the certificate. All registered owners must also **date and sign** the certificate exactly as the name appears on front.

2. SIGNATURE

All parties on the account must sign the letter. (Include additional signatures as necessary)

Signature of Owner Name (Please Print) / /
Date

Social Security Number of Owner

Medallion Signature Guarantee - Required (Signature guarantees can be obtained at most financial firms)

Signature of Authorized Officer Date

Name of Institution and Title