

Calvert Foundation GIVING FUND

Letter of Instruction For Mutual Funds and Securities

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

Please complete the letter and submit as follows:

Instructions
<p>Send to Calvert Giving Fund:</p> <ul style="list-style-type: none">▪ Copy of the LOI▪ Completed Application or Additional Contribution Form <p><u>You MUST return a copy of the completed LOI to Calvert Foundation before initiating a securities transfer to ensure your account is properly credited.</u></p> <p>THEN send to the firm currently holding the securities:</p> <ul style="list-style-type: none">▪ Original Letter of Instruction with Medallion Signature Guarantee <p>(The Medallion Signature Guarantee may not be required by all securities firms in order to initiate your transfer. You should contact your particular firm for their requirements.)</p>

*Physical stock certificates may require a **Third Party Release Form** and additional paperwork (please call 800.248.0337 for additional information).

Send 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

Holding Firm Information

Name of Company Firm Mailing Address

Daytime Telephone City State Zip

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*
4. _____ 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.

*Please note that some securities firms may not be able to transfer *Mutual Fund* holdings directly to the Charles Schwab & Co, Inc. account listed above. If you encounter this situation, please contact a Calvert Foundation Associate and we will assist you in facilitating the transfer.

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 - If Required by securities firm (Signature guarantees can be obtained at most financial firms)

Signature of Authorized Officer Date

Name of Institution and Title