Forms & E-Delivery

Electronic Delivery

You can choose to receive e-mail notification when shareholder documents, account statements or transaction details are available on-line instead of receiving paper copies in the mail.

To activate electronic delivery and stop receiving paper copies of your shareholder account statements, transaction confirmations, and/or tax forms, please click on the following link to enroll for on-line account access: **Activate Electronic Delivery of Account Statements, Confirmations and Tax Forms**

To activate electronic delivery and stop receiving paper copies of your shareholder documents (annual reports, semi-annual reports, proxy statements, prospectuses), please click on the following link to enroll for electronic delivery: **Activate Electronic Delivery of Shareholder Documents**

Please note these links will take you to non-Eaton Vance Web sites for electronic delivery. Eaton Vance is not responsible for any information on these Web sites nor is Eaton Vance responsible for operation of these Web sites.

Forms

Please consult a financial advisor before filling out any of the forms below. The forms below should be used to make changes to an existing Eaton Vance mutual fund account. Please contact a financial advisor to open a new Eaton Vance mutual fund account. Eaton Vance Distributors, Inc. (EVD), the principal underwriter of the Eaton Vance mutual funds, strongly encourages the use of a financial advisor when purchasing shares of Eaton Vance Funds. EVD does not provide tax, legal, insurance or investment advice and cannot determine whether an investment offered by EVD is appropriate or suitable for you based on your investment objectives and personal and financial situation. For more complete information, including investment objective, risks, charges and expenses, please contact your financial advisor for a prospectus. Read the prospectus carefully before you invest or send money.

If you have questions about any of the forms below, please call 1-800-262-1122 from 8:30 AM to 5:30 PM Eastern Time, Monday through Friday.

All forms can be mailed to:

Regular Mail
Eaton Vance Funds
P.O. Box 534439
Pittsburgh, PA 15253-4439 USA

Overnight Mail
Eaton Vance Funds
Attention: 534439
500 Ross Street, 154-0520
Pittsburgh, PA 15262

The below forms are for Eaton Vance funds only. For Calvert forms, please go to Calvert.com

Non-Retirement Forms

- **Affidavit of Domicile Form**
- **Automatic Investment Plan Application**: To establish systematic purchases to your Eaton Vance mutual fund account.
- **Bank Authorization Form**: To establish banking instructions on an existing account.
- **Beneficial Ownership Certification Form**: Used to certify account owners not listed in the registration.
- **Change of Dealer Form**: To update the name of the dealer firm on an account.
- **Cost Basis Election Form**
- **Distribution/Instruction Special Payee Form**: To send dividend and capital gains distributions from an Eaton Vance mutual fund account to a different payee or a bank account.
- **Fund Selection Guide**: A comprehensive listing of all Eaton Vance open-end mutual funds and their corresponding fund numbers.
- **Letter of Instruction**: To give instructions not covered by other forms.
- **Name Change Request Form**: To update names in the account registration or certify as one in the same person.
- **New Account Application Form** Content for Investment Professionals only
- **Non-Retirement Account Re-Registration Form**: To change ownership of a non-IRA account.
- **Non-Retirement Redemption Authorization Form**: To sell shares from a non-IRA account.
- **Systematic Withdrawal Plan Application**: To establish systematic payments from your Eaton Vance mutual fund account to the mailing

address on file, a different payee or a bank account.

- **Third Party Mailing Address Form for Duplicate Account Statements**: To allow a duplicate account statement to be mailed to a different address than shown on the account.
- **Transfer on Death Application**
- **UTMA/UGMA Change of Account Registration**

Retirement Forms

- **403(b) Beneficiary Form**: To add or change beneficiaries to an existing 403(b) account.
- **Eaton Vance Funds Roth Individual Retirement Account (IRA) Certification of Direct Rollover of Assets from A 529 Plan**
- **IRA Designation of Beneficiary**: To add or change beneficiaries to an existing Eaton Vance IRA account.
- **IRA Distribution Request Form**: To redeem from an IRA account.
- **IRA Required Minimum Distribution Form**: To request a Required Minimum Distribution from an IRA account.
- **IRA Transfer of Assets – Direct Rollover & Rollover Certification**: To rollover IRA assets.
- **Disclaimer and Affidavit of Designated Beneficiary Form**: To disclaim, renounce and refuse to accept the right of inherited assets.
- **Inherited IRA – Affidavit of Domicile**
- **Inherited IRA Application for Non-Spouse, Trust, Estate or Entity**: To establish an Inherited IRA.
- **Inherited IRA Distribution Form**: To request a one-time redemption, establish systematic redemptions, or to request RMD calculated pay-outs.
- **Inherited IRA TOA – Direct Rollover Form**: Used for inherited IRA trustee-to-trustee transfers.
- **IRA Inheritance Request Form – Non-Spouse, Trust, Estate of Entity Beneficiary**
- **IRA Inheritance Request Form – Spouse Beneficiary**
- **Qualified Charitable Distribution Request Form**: To request a Qualified Charitable Distribution from your IRA.
- **Roth IRA Conversion Form – External**: To convert a non-Eaton Vance IRA to a Roth IRA.
- **Roth IRA Conversion From – Internal**: To convert an Eaton Vance IRA to a Roth IRA.
- **Traditional & Roth Individual Retirement Account Application** Content for Investment Professionals only: To establish a Traditional or Roth IRA.
- **Self-Certification for Acceptance of Late Rollover Contribution**

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