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
P.O. Box 9653
Providence, RI 02940-9653

Overnight Mail
Eaton Vance
4400 Computer Drive
Westborough, MA 01581

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**
- **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**

## Retirement Forms

- **403(b) Beneficiary Form**: To add or change beneficiaries to an existing 403(b) account.
- **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.
- **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**

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[Link to Eaton Vance website]
Before investing in any Eaton Vance fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or download a copy here. Read the prospectus carefully before you invest or send money. For closed-end funds, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or download a copy here. Before purchasing any variable product, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.


Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

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