



Investment Application

Columbia University — Plan I.D. #104

To be completed by employee. For assistance please call 800.368.2745

1 Account Registration (Please type or print clearly)

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

Name _____			Social Security Number _____	
Address _____			Date of Birth (month/date/year) _____	
City _____	State _____	Zip _____	Daytime Phone Number _____	

2 Initial Investment (Select one option):

- My initial investment will consist of a salary reduction forwarded by my employer.
- My initial investment will consist of a transfer of funds from a 403(b) TSA held with another institution. I have enclosed the Transfer Request Form on which I have specified how these transferred funds are to be invested.

3 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 portfolio will automatically be invested in CSIF Money Market Portfolio.

***Before completing this section, please check with your Benefits Office to determine if you will be receiving Columbia University contributions.**

EMPLOYEE VOLUNTARY CONTRIBUTIONS 403(b)

MONEY MARKET FUND

904 CSIF Money Market Portfolio _____ %

FIXED-INCOME FUNDS

916 CSIF Bond Portfolio _____ %

908 Calvert Income Fund _____ %

970 Calvert Ultra-Short Floating Income Fund _____ %

BALANCED AND ASSET ALLOCATION FUNDS

905 CSIF Balanced Portfolio _____ %

962 Calvert Conservative Allocation Fund _____ %

963 Calvert Moderate Allocation Fund _____ %

964 Calvert Aggressive Allocation Fund _____ %

EQUITY FUNDS

911 Calvert New Vision Small Cap Fund _____ %

960 Calvert Small Cap Value Fund _____ %

926 Calvert World Values International Equity Portfolio _____ %

914 Calvert Capital Accumulation Fund _____ %

961 Calvert Mid Cap Value Fund _____ %

934 Calvert Large Cap Growth Fund _____ %

933 Calvert Social Index Fund _____ %

910 CSIF Enhanced Equity Portfolio _____ %

919 CSIF Equity Portfolio _____ %

TOTAL 100%

EMPLOYER CONTRIBUTIONS* 401(a)

MONEY MARKET FUND

904 CSIF Money Market Portfolio _____ %

FIXED-INCOME FUNDS

916 CSIF Bond Portfolio _____ %

908 Calvert Income Fund _____ %

970 Calvert Ultra-Short Floating Income Fund _____ %

BALANCED AND ASSET ALLOCATION FUNDS

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961 Calvert Mid Cap Value Fund _____ %

934 Calvert Large Cap Growth Fund _____ %

933 Calvert Social Index Fund _____ %

910 CSIF Enhanced Equity Portfolio _____ %

919 CSIF Equity Portfolio _____ %

TOTAL 100%

continued on reverse

