

## DC College Savings Program Authorization for Automatic Payroll Deduction

### WELCOME TO THE DC COLLEGE SAVINGS PLAN.

In order to sign up for payroll deduction for the DC College Savings Plan, **you must first open a DC College Savings Plan account.** If you have already opened an account, you are ready to fill out this form. If you have not already opened an account, you can download a College Savings Plan Participation Agreement at [www.DCCollegeSavings.com](http://www.DCCollegeSavings.com). Or, talk to your Human Resources Specialist to get a Participation Agreement. If you have any questions, please call **800.987.4859 (800.368.2745 for non-D.C. residents)** Monday-Friday, from 9 A.M. to 5:30 P.M. ET.

After completing all sections, return the original of this form to Human Resources.

### 1 Select one of these options:

- I want to start payroll deduction
- I want to change the dollar amount of my payroll deduction
- I want to change how I allocate my payroll deduction
- I want to stop payroll deduction

FIRST NAME \_\_\_\_\_ MIDDLE INITIAL \_\_\_\_\_ LAST NAME \_\_\_\_\_

SOCIAL SECURITY NUMBER    -   -

DAYTIME PHONE    -    -

STREET ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

### 2 Authorization

I authorize \$ \_\_\_\_\_ to be deducted from my pay each pay period. The minimum amount that may be deducted is \$15 per pay period for each investment option. Here is how I want you to allocate my payroll deduction:

BENEFICIARY NAME(S) \_\_\_\_\_ FUND NAME OR NUMBER *(see back for Funds)* \_\_\_\_\_ PERCENT (round to whole numbers) \_\_\_\_\_

_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Allocation = 100%

### 3 Signature

By signing this form, I authorize my employer to deduct the amount I have indicated above from my paycheck each pay period. I understand that depending on the laws of my home state, I may receive more favorable tax treatment for investing in a Section 529 college savings plan in my home state.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

**For Employer Use Only** — When completing the ACH (Automated Clearing House) electronic transfer, **code the transmittal for checking**. Please transmit funds to State Street Bank & Trust:

Routing Number

Account Number

Employee SSN \_\_\_\_\_

Calvert Authorization \_\_\_\_\_

## Checklist for Payroll Deduction

- Have you previously established a DC College Savings Account? If you do not have an account, did you obtain a Participation Agreement (which you can download from [www.DCCollegeSavings.com](http://www.DCCollegeSavings.com), or obtain from your Human Resources department)?
- Do your percentage allocations add up to 100%? Did you use whole numbers?
- Is your contribution at least \$15 per Investment Option per pay period?
- Did you sign this form?
- Once completed, please return your form to Human Resources.

## DC College Savings Plan Investment Options

### Age-Based Portfolio Strategy (Beneficiary's Age)

- FUND 59:** DC College Savings Age Band 0 – 5
- FUND 62:** DC College Savings Age Band 6 – 10
- FUND 63:** DC College Savings Age Band 11 – 13
- FUND 65:** DC College Savings Age Band 14 – 16
- FUND 67:** DC College Savings Age Band 17 and up

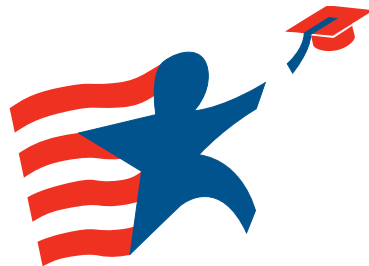
### Single Fund Investment Strategy

- FUND 40:** Calvert Income Fund — DC 529
- FUND 123:** Calvert Balanced Portfolio<sup>1</sup> — DC 529
- FUND 82:** State Street Equity 500 Index Fund — DC 529
- FUND 47:** Calvert Equity Portfolio<sup>2</sup> — DC 529
- FUND 89:** Calvert Small Cap Fund<sup>3</sup> — DC 529
- FUND 136:** Calvert International Equity Fund — DC 529<sup>4</sup>

### Stability of Principal Investment Strategy

- FUND 56:** Acacia Principal Plus — DC 529

1. Fund formerly referred to as Calvert Social Investment Fund Balanced Portfolio.
2. Fund formerly referred to as Calvert Social Investment Fund Equity Portfolio.
3. On November 29, 2010 Calvert Small Cap Value Fund converted from a small-cap value fund to a small-cap core fund and was renamed Calvert Small Cap Fund.
4. Fund formerly referred to as Calvert World Values International Equity Fund.



## DC College Savings Plan

DC College Savings Program Trust  
Calvert Investment Distributors, Inc.\*  
PO Box 11466  
Washington, DC 20008

Any questions? Just call 800.987.4859 (800.368.2745 for non-D.C. residents)

\*Prior to 4/30/11, Calvert Investment Distributors, Inc. was named Calvert Distributors, Inc.

AF10063-201101