

# Systematic Exchange Form



**Mail to: Calamos Family of Funds**

c/o U.S. Bancorp Fund Services, LLC  
 P. O. Box 701  
 Milwaukee, WI 53201-0701

**Overnight mail to: Calamos Family of Funds**

c/o U.S. Bancorp Fund Services, LLC  
 615 E. Michigan St., 3rd Floor  
 Milwaukee, WI 53202-5207

Use this form to establish a Systematic Exchange Plan ("Plan") for your account. A Plan will initiate exchanges between your accounts at regular, periodic times. Please read everything carefully and complete all sections of this form. To ensure timely processing, please return this form within fifteen days of the initial transaction. Exchanges between different classes of shares are not allowed.

Note: Please do not use this form to establish a Systematic Exchange from an IRA account to a non-IRA account. Instead, please call us at 800.582.6959 and request an IRA Distribution form. If you are under the age of 59½ and are making an exchange from an IRA account to a non-IRA account, along with regular tax liability, you may be subject to a premature distribution penalty.

If you are exchanging from a non-IRA account to an IRA account, the purchases to your IRA account will be recorded as current year contributions.

Please print. If you have any questions about completing this application, call a Customer Service Representative at 800.582.6959 (Hours: Monday-Friday, 8:00 a.m. to 6:00 p.m. Central time).

**1. YOUR ACCOUNT INFORMATION**

Please specify your account information.

Account Registration

Social Security Number

**2. ACCOUNT YOU WOULD LIKE TO EXCHANGE FROM**

Please review the prospectus carefully before submitting any systematic exchange requests. If you have any questions, please call a customer service representative at 800.582.6959.

SELECT FUNDS	SELECT SHARE CLASS		EXCHANGE AMOUNT
<input type="checkbox"/> Growth	<input type="checkbox"/> A (606)	<input type="checkbox"/> C (620)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Growth and Income	<input type="checkbox"/> A (604)	<input type="checkbox"/> C (618)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Opportunistic Value	<input type="checkbox"/> A (634)	<input type="checkbox"/> C (636)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Dividend Growth	<input type="checkbox"/> A (1982)	<input type="checkbox"/> C (1983)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Global Growth and Income	<input type="checkbox"/> A (607)	<input type="checkbox"/> C (621)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> International Growth	<input type="checkbox"/> A (645)	<input type="checkbox"/> C (647)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Global Equity	<input type="checkbox"/> A (1913)	<input type="checkbox"/> C (1915)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Evolving World Growth	<input type="checkbox"/> A (1952)	<input type="checkbox"/> C (1954)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Emerging Market Equity	<input type="checkbox"/> A (2347)	<input type="checkbox"/> C (2348)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Convertible	<input type="checkbox"/> A (603)	<input type="checkbox"/> C (617)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Global Convertible	<input type="checkbox"/> A (2971)	<input type="checkbox"/> C (2972)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Market Neutral Income	<input type="checkbox"/> A (605)	<input type="checkbox"/> C (619)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Hedged Equity Income	<input type="checkbox"/> A (2977)	<input type="checkbox"/> C (2978)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Phineus Long/Short	<input type="checkbox"/> A (5084)	<input type="checkbox"/> C (5085)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> High Income Opportunities	<input type="checkbox"/> A (608)	<input type="checkbox"/> C (622)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Total Return Bond	<input type="checkbox"/> A (1929)	<input type="checkbox"/> C (1931)	\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Short-Term Bond	<input type="checkbox"/> A (5617)		\$ <input style="width: 100px;" type="text"/>
<input type="checkbox"/> Fidelity Investments Money Market Treasury Portfolio	<input type="checkbox"/> A (5141)		\$ <input style="width: 100px;" type="text"/>

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## 3. EXCHANGE FREQUENCY

Make my exchanges  Monthly or  during the following months:

- January     February     March     April     May     June  
 July     August     September     October     November     December

Start/stop my Systematic Withdrawal on this day:  (for example, January 10 is 01/10).  
 (If you do not select a day, your withdrawal will be processed on or about the 25th of the month).

## 4. ACCOUNT YOU WOULD LIKE TO EXCHANGE INTO

If you are establishing a new account, you must meet the applicable new account minimum of \$2,500 (or \$500 for IRA accounts)

Please review the prospectus carefully before submitting any purchase requests. If you have any questions, please call a customer service representative at 800.582.6959.

SELECT FUNDS	ACCOUNT NUMBER	SELECT SHARE CLASS	
<input type="checkbox"/> Growth	<input type="text"/>	<input type="checkbox"/> A (606)	<input type="checkbox"/> C (620)
<input type="checkbox"/> Growth and Income	<input type="text"/>	<input type="checkbox"/> A (604)	<input type="checkbox"/> C (618)
<input type="checkbox"/> Opportunistic Value	<input type="text"/>	<input type="checkbox"/> A (634)	<input type="checkbox"/> C (636)
<input type="checkbox"/> Dividend Growth	<input type="text"/>	<input type="checkbox"/> A (1982)	<input type="checkbox"/> C (1983)
<input type="checkbox"/> Global Growth and Income	<input type="text"/>	<input type="checkbox"/> A (607)	<input type="checkbox"/> C (621)
<input type="checkbox"/> International Growth	<input type="text"/>	<input type="checkbox"/> A (645)	<input type="checkbox"/> C (647)
<input type="checkbox"/> Global Equity	<input type="text"/>	<input type="checkbox"/> A (1913)	<input type="checkbox"/> C (1915)
<input type="checkbox"/> Evolving World Growth	<input type="text"/>	<input type="checkbox"/> A (1952)	<input type="checkbox"/> C (1954)
<input type="checkbox"/> Convertible	<input type="text"/>	<input type="checkbox"/> A (603)	<input type="checkbox"/> C (617)
<input type="checkbox"/> Global Convertible	<input type="text"/>	<input type="checkbox"/> A (2971)	<input type="checkbox"/> C (2972)
<input type="checkbox"/> Emerging Market Equity	<input type="text"/>	<input type="checkbox"/> A (2347)	<input type="checkbox"/> C (2348)
<input type="checkbox"/> Market Neutral Income	<input type="text"/>	<input type="checkbox"/> A (605)	<input type="checkbox"/> C (619)
<input type="checkbox"/> Hedged Equity Income	<input type="text"/>	<input type="checkbox"/> A (2977)	<input type="checkbox"/> C (2978)
<input type="checkbox"/> Phineus Long/Short	<input type="text"/>	<input type="checkbox"/> A (5084)	<input type="checkbox"/> C (5085)
<input type="checkbox"/> High Income Opportunities	<input type="text"/>	<input type="checkbox"/> A (608)	<input type="checkbox"/> C (622)
<input type="checkbox"/> Total Return Bond	<input type="text"/>	<input type="checkbox"/> A (1929)	<input type="checkbox"/> C (1931)
<input type="checkbox"/> Short-Term Bond	<input type="text"/>	<input type="checkbox"/> A (5617)	
<input type="checkbox"/> Fidelity Investments Money Market Treasury Portfolio	<input type="text"/>	<input type="checkbox"/> A (5141)	

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## 5. SIGNATURE

- I understand that this Systematic Exchange Plan will operate until I cancel the Plan, either via telephone to the Funds' transfer agent or in writing to same. While there is no fee if there is not enough cleared money in my account to cover a withdrawal, I understand that the Fund may redeem my remaining position in the Fund and close my account. Also, I acknowledge that if a Plan is stopped due to insufficient funds, it will not automatically restart and that I must submit a new Systematic Exchange Plan form to restart the Plan.

Lastly, I have read and understand the prospectus and any supplements to it, especially the sections that pertain to the Systematic Exchange Plan.

<b>X</b>	
Primary Owner Signature*	Date (MM/DD/YYYY)

<b>X</b>	
Joint Owner Signature* (if applicable)	Date (MM/DD/YYYY)

\* If shares are to be registered in (1) joint names, both persons must sign, (2) a custodian for a minor, the custodian should sign, (3) a trust, the trustee(s) should sign, or (4) a corporation or other entity, an officer should sign and print name and title on the space provided for the Joint Owner.

# Systematic Exchange Form

CALAMOS®  
INVESTMENTS

Calamos Financial Services LLC, Distributor  
2020 Calamos Court | Naperville, IL 60563-2787  
800.582.6959 | [www.calamos.com](http://www.calamos.com) | [caminfo@calamos.com](mailto:caminfo@calamos.com)

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